

Older Workers

A Key to Bridging the Workforce Gap



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Kari Benson, Executive Director, The Minnesota Board on Aging
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Robin Brooksbank, Charles Tombarge, and Susan Wootten
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Professor Kevin Gerdes and Professor MayKao Hang

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Executive Summary

The generation born between 1946 and 1964 is large in relation to successive generations (Pew Research, 2016). A continuing trend of lower birth rates, combined with large numbers of expected retirements, has left Minnesota's economy facing a shortage of employment-ready workers. State and federal programs to expand the workforce and develop workers' skills among younger generations will be insufficient to meet the state's need for workers between 2020 and 2030. Could older workers be a potential solution to help bridge the workforce gap?

This study, conducted in partnership with Hennepin County, sought to answer the following questions for the Minnesota Board on Aging:

1. How prevalent are older workers in Hennepin County, and what are their characteristics compared to younger workers?
2. What skills do older workers provide, and how are they viewed by Hennepin County leaders?
3. What are the benefits and challenges of employing older workers in Hennepin County?
4. What does Hennepin County need from its future workforce, and does the County view older workers as potentially filling that need?
5. What is Hennepin County doing now to recruit and retain older workers, and do County leaders believe those efforts are effective?

Both primary and secondary data sources were used in this research. The study utilized a literature review; Hennepin County 2016 workforce data; an online survey distributed to 1,491 County administrators, directors, supervisors, and managers and completed by 20% (297); and in-depth, qualitative interviews with 10 County leaders. The study was conducted between May and August 2017. The study revealed the following:

Older workers are strongly represented in Hennepin County leadership positions. At the end of 2016, older workers represented about 34% of the 8,022 total permanent employees in Hennepin County. By comparison, in 2015 19% of the total workforce in Minnesota was 55 years old or older (Minnesota DEED, 2016). Because many older workers in the County hold leadership positions, the County's leadership ranks will be greatly affected by retirements in the coming decade.

Older workers are respected, particularly for their knowledge, loyalty, and professionalism.

Employers value the skills and characteristics of older workers (Schramm & Wessels, 2014; Feinsod & Illiano, 2015), and Hennepin County is no different. County leaders pointed to an ability to work independently and a commitment to quality work as additional skills common among older workers.

Meanwhile, leaders viewed other skills such as possessing a strong work ethic and demonstrating reliability as common across generations. While County leaders view older workers as being able to learn and apply new technology, they acknowledge the need for continued training.

The benefits of older workers are many: experience, resilience, mentorship, customer service, and communications. County leaders also view older workers as providing an ability to build relationships, be productive, and take a mature approach to their work.

The challenges of employing older workers include their occasional inability to adapt to workplace changes, such as mastering new technology, as well as physical limitations and taking time off for elder parent care. However, respondents suggest these challenges depend on the individual, and in some cases, affect younger generations as well (i.e., a need to take time off for child care).

Communication, ability to build relationships, leadership skills, and management expertise are needed in the future workforce. Most (98%) survey respondents said it is important for employees to have the skills required for a position upon hiring, but respondents are open to training to further build employee skills.

Older workers are key to the County's future. Nearly 64% of survey respondents said it is important to encourage older employees to stay in the workplace past traditional retirement age to meet future department needs. About 82% said they are likely to consider hiring an employee who has previously retired.

The County actively works to utilize and attract older workers. Approaches that encourage older workers to consider Hennepin County as an employer of choice include flexible work places, ability to work remotely, phased retirement, and limited duration contracts. The County has also worked to improve communication around non-salary benefits to highlight the attractive nature of County employment.

The good news is that most successful retention and recruitment efforts benefit younger workers as well as older workers. Flexible work time and place, increased communication through the "Total Rewards" benefit program, mentorship, and training are among the efforts that provide benefits across all current and potential employee age groups.

Recommendations

Recommendations were developed and trade-offs were considered by the research team, which sought additional feedback from the Minnesota Board on Aging and Hennepin County. The criteria of efficiency, mission relevance, cultural fit, and feasibility were applied to recommendations for each organization, as follows:

The Minnesota Board on Aging

1. Support policies that benefit older workers — particularly provisions that will help workers who lack sufficient retirement savings, and who therefore will benefit most from staying in the workforce past retirement age.
2. Advise and educate Minnesotans on the workplace shortage and opportunities for employers to utilize older workers through thought leadership activities and an effort to create common language about the value of older workers.
3. Continue research on this issue, such as involving Minnesota nonprofit, for-profit, and other public-sector employees.

Hennepin County

1. Continue to celebrate the value of older workers.
2. Develop conversation guidelines for returning older workers and their managers as a way to clarify roles and new work expectations.
3. Encourage two-way mentoring to promote greater understanding and respect among all employees.
4. Continue communication regarding the worker shortage *and* solutions.

Conclusions

Based on findings from this study, Hennepin County clearly recognizes the opportunity and value that older workers provide toward meeting its mission and goals. As more employers similar to Hennepin County face worker shortages, they will need to creatively apply productivity improvements and other accommodations to attract and retain employees of *all* ages. This means greater focus on remote work possibilities, as well as on other workplace offerings. We recommend further study on employer attitudes toward older workers, including data-gathering from non-government sectors, and from employers whose management levels are not dominated by older workers. We also recommend specific research on employer attitudes toward older workers from minority populations and contrasting attitudes within urban and rural settings.

Introduction to the Study

The Baby Boomer generation is generally defined as those born between 1946 and 1964. This population is large relative to other generations (Pew Research, 2016). Demographers and others studying labor trends began in the early 2000s to anticipate the impact on employers of retiring Boomers, particularly on programs such as Social Security and overall policy areas including healthcare spending.

The picture clouded, however, during the economic uncertainty of the 2008–2009 financial crisis, and in years that followed. Unemployment remained high. Continued globalization of the world’s economy created further uncertainty, especially for certain market sectors (e.g. manufacturing and agriculture). Technology helped foster structural societal and market changes. Meanwhile, low or “underwater” housing values combined with these other factors to leave many Americans concerned about their long-term financial stability. During this period, policy and legislative attention focused on preventing a similar financial calamity in the future, as well as on health care, immigration policies, and a myriad of other policy areas.

What didn’t receive as much media attention and general awareness was the possibility of a rapidly approaching worker shortage. However, as the U.S. economy improved in the aftermath of the recession, a continued demographic trend of lower birth rates and the inevitable increase in Boomer retirements has left the American economy facing a shortage of employment-ready workers. A potential reduction in work-ready immigrants will further exacerbate the situation.

Minnesota’s Picture

Minnesota faces the same demographic trends as the rest of the country, with a worker shortage threatening the overall vitality of the state’s economy (Governor’s Workforce Development Council, 2017). Indeed, we remain “above average” in this area, as Minnesota is among the top 10 states in number of residents born between 1946 and 1964, comprising the same group of workers who have been or are currently retiring in large numbers, thus contributing to the looming worker shortage (Moen, Kojola, & Schaefer, 2015).

Recently, the need to improve worker readiness and training has become more widely recognized, both in the workplace and in media reports. Many Minnesota and federal programs have been developed to expand the workforce and develop workers’ skills (Lindsley/Governor’s Workforce Development Council, 2013). However, these programs will be insufficient to fill the state’s need for workers. In addition, programs have generally focused on improving prospects for youth and underrepresented minority populations who lack opportunities for skilled employment, either due to social and economic structural inequalities (e.g. resulting from impoverished backgrounds and/or lack of educational opportunities), or barriers arising from their status as relatively recent immigrants.

Improved Health and Increased Life Expectancy

Since 1960, the average life expectancy for U.S. males has increased from 67 years to 76 years, and, for U.S. females, from 73 years to 82 years (Data360.org). Importantly, Americans not only are living longer, but improvements in health care, particularly in cardiovascular health (e.g., fewer heart attacks and strokes) and vision care (e.g., fewer falls), have contributed to longer lives with less disability during old age (Moeller, 2016). Americans have remained healthier as they age, but employment practices and regulatory requirements continue to expect people to retire between the ages of 62 and 67. This means U.S. workers may have 20 to 30 additional years of productive life remaining after typical retirement age. The popular press, as well as financial service companies, have worked to publicize awareness of this expanded retirement timeframe and educate potential retirees about why retirement savings must last longer.

Is There a Solution to the Worker Shortage?

The following questions were explored on behalf of the Minnesota Board on Aging as part of the Master of Public Affairs Summer Capstone Workshop at the Humphrey School of Public Affairs. Recognizing research time constraints for this study, additional investigation into these areas may be needed in the future. Regardless, this study aims to increase the existing body of knowledge from a Minnesota employer's point of view on the issue of a future worker gap, and identify recommendations and areas of research that could form the basis for future efforts by the Minnesota Board on Aging and Hennepin County.

Research Focus: Demographics

1. How prevalent are older workers (ages 55+) in Hennepin County government, and what are their demographic characteristics compared to younger workers?

Research Focus: Current Workplace

2. What skills do older workers provide, and how are those skills viewed by leaders across Hennepin County government?
3. What are the benefits and challenges of employing older workers in Hennepin County government?

Research Focus: Future Workplace

4. What does Hennepin County government need from its future workforce, and does the County view older workers as potentially filling that need?
5. What is Hennepin County government doing now to recruit and retain older workers, and do County leaders believe those efforts are effective?

Study Methodology and Participants

This study was conducted in partnership with the Minnesota Board on Aging and Hennepin County between May 15, 2017, and August 30, 2017. Hennepin County was selected as a strategic public-sector employer for this research because of the scope of the County’s comprehensive lines of business (e.g., technology, healthcare, administrative operations, human services, human resources, public safety, and public works); the ease of team access to research subjects facilitated by the existing Hennepin-University Partnership (<http://hup.umn.edu>); and the prospect of efficiency, given the project’s summer term constraints.

The study utilized four research and data collection methods:

Review of Existing Data

Hennepin County records workforce statistics at the end of each calendar year. The Human Resources Office provided the presentation, “2016 Workforce Statistics,” by Michael Rossman, Hennepin County Chief Human Resources Officer, and an information card, “Hennepin County Workforce Data: Year-End 2016,” which was updated Feb. 17, 2017. These data were reviewed and additional statistics requested to address the research questions and clarify workforce information.

Literature Review

The literature review included more than 30 sources including peer-reviewed journals, research articles, and white papers, to government, nonprofit, and media reports. Initial references were provided by Mary Jo Schifsky, liaison to the Minnesota Board on Aging, and by performing a targeted search of the Google Scholar database using terms such as *bridge employment*; *baby boomers and workplace*; *encore adulthood*; *employer attitudes toward older workers*; *delayed/phased retirement*; *workforce gap*; and *worker shortage*. A broader internet search of terms, topics, and aging-services organizations related to the research questions was also conducted.

Survey

A survey was developed to test information from the literature review, and together they informed key leader interview questions. Using Qualtrics® survey software, the research team created and launched an anonymous, 16-question online survey on June 8, 2017, and closed the survey on June 16, 2017. The survey was distributed through email by Hennepin County Human Resources to 1,491 leaders across the county (i.e., five executive-level administrators, 36 department directors, 350 managers, and 1,100 supervisors). The largely quantitative survey—which included up to two open-ended response questions—was completed by 297 respondents for a 20% response rate. Pressing County email demands over the same time period

prevented the team from sending a reminder to survey recipients. See Appendices A–D for survey protocols, including copies of the original email notice and survey questions.

Key Leader Interviews

Ten Hennepin County leaders participated in in-depth interviews between June 26, 2017, and July 18, 2017. The team theorized that one-on-one interviews would encourage interview participants to answer questions more honestly than if asked within the context of a peer focus group, thereby allowing the opportunity to more deeply probe study matter. Interview participants were chosen at random by the research team from a master list of 33 potential subjects provided by Hennepin County’s Human Resources department. The master list, received from the County on June 22, 2017, represented the four primary areas of Hennepin County Government work (i.e., Public Safety, Public Works, Human Services, and Operations). These designations allowed the research team to seek potential diversity of interview representation in terms of workforce area and gender.

The research team contacted individuals by email to schedule one-on-one interviews. When potential participants declined to participate or did not respond, the team randomly selected additional subjects for participation. Nine interviews were conducted in person and one by phone, and were recorded and transcribed. Interviewers also took notes to ensure accuracy and context. Each interview participant signed an Institutional Review Board (IRB) form confirming agreement to allow anonymous interview responses to be included in the final research. Following the interviews, the team reviewed transcripts, selected direct quotations and notes to identify and code common themes, and located statistics that would inform findings. See Appendices E–I for interview protocols, including interview questions and coded themes.

Research Limitations

As with all research, this study faced limitations that affected the findings and final recommendations. They include:

- **Limited Time** — The study was conducted between late May and late July 2017, limiting the team’s capacity to conduct a broader literature review, data collection, and analysis, as well as beta testing of the survey instrument and interview questions.
- **Public Sector Data Source** — Results do not include data from other employer segments, such as for-profit and nonprofit employers, organizations of varied sizes, and rural vs. metro employers.
- **Survey Question Format** — Some survey questions allowed respondents to choose multiple options within a single question without ranking chosen options. This prevented the team from identifying quantitative findings on those questions.

- **Age Grouping Terminology** — The team’s use of popular demographic group terms also in wide use by the County (e.g. Baby Boomers, Gen X, Millennials) may have skewed survey responses by suggesting age bias.
- **Number of Interviews** — The study included only 10 one-on-one interviews; more data constructs might have been identified with additional interviews and more time.
- **Survey Response Rate** — The survey response rate was 20%. No opportunity was available to send follow-up reminders to Hennepin County leadership who were invited to take the survey because of other pressing email messages previously scheduled by the County.

The original project description proposed by the client involved determining the return on investment (ROI) of older workers. During the study’s scoping phase, the research team investigated how this value might be calculated. The team determined that attempting to place an economic value on comparative groups of workers (e.g. the value of a teacher vs. a groundskeeper, or an older worker vs. a younger worker) would be extremely difficult, requiring value judgments and economic analysis that was beyond the capabilities of the team. In addition, Hennepin County does not share data segmented by age on its benefits and health care costs. As a result, the team recommended, and the Minnesota Board on Aging agreed, that this study would focus on the intangible benefits and challenges of older workers, as viewed by employers. The team and the Board on Aging agreed to forgo efforts to determine the ROI of older workers as part of this study.

Literature Review

As the team researched employer attitudes and efforts directed toward the recruitment, hiring, training, retention, and retirement of Boomers in the workforce (those born between 1946 and 1964), it looked specifically for Minnesota trends, but also uncovered national and international data. Research references provided by the Minnesota Board on Aging liaison, as well as a broad Google Scholar database search for keywords and phrases, formed the basis of this comprehensive literature review and subsequent research.

Note: For consistency, this literature review follows Hennepin County's practice of using the following generational demographic terms: *Traditionalists* (pre-1946); *Boomers* (1946-1964; often *Baby Boomers*); *Gen X* (1965-1981), *Millennials* (1982-1994; also *Gen Y*); and *Gen Z* (1995-2017).

Background

In 2013, Boomers comprised one-fifth of the national workforce. This figure coincides with Minnesota workforce data for 2013, which reveals about 21% of employees in the state were Boomers (Minnesota DEED, 2015). By 2014, the Minnesota Boomer distribution had grown to 21.8% of the state workforce, with 17.1% between the ages of 55 and 64, and 4.7% aged 65 and above (Minnesota State Demographic Center, 2016).

Because of a gradual decrease in the national birthrate, and an imbalance between the large Boomer population relative to the Gen X and Millennial generations present in the U.S. workforce, Minnesota (and the nation) faces a labor shortage that will peak between 2020 and 2025. These are the years during which the youngest Boomers will begin to retire at age 55+ (Minnesota State Demographic Center, 2013). Overall, “the net level of migration (domestic and international), labor force participation rates, the retention of our workforce, and the health and educational preparedness of our young people entering the workforce will together define the new labor force in Minnesota” (Ibid.).

The number of replacement workers available over the same 2020–2025 period will be inadequate to fill openings left by Boomer retirements in Minnesota. Without new policy directives and strategies (i.e., offering today's Boomers incentives for delaying retirement, encouraging in-migration from other states, and supporting immigration from other countries), the labor deficit will severely affect Minnesota's economic climate and expansion (Allen, 2017). Technological efficiencies alone will not bridge the gap.

Replacing retiring Baby Boomers will continue to be a key staffing challenge in the years ahead. Organizations that can continue to engage their mature workforce and even retain them beyond retirement age will have an advantage (Farrell, 2016).

Employers Value Loyalty, Reliability, and Productivity

Employers value older workers' loyalty to the company or organization, appreciate their work ethic, consider them reliable, and value their years of experience on the job (Munnell, Sass, & Soto, 2006). Employers who expect robust growth in the decade ahead are more apt to offer options for employees to continue working beyond typical retirement age. The effect on a company's knowledge base when a large number of older workers stay two to four years beyond typical retirement age is viewed as *Somewhat Positive* or *Highly Positive* by a majority of respondents in a nationally-representative employer survey. "Older workers are viewed as valuable repositories of institutional [knowledge]" (Eschtruth, et al., 2007).

Older white-collar workers are viewed "as more productive than younger white-collar workers," and older workers' high productivity levels can offset higher costs that employers experience because of healthcare and workplace accommodations. Age is considered an advantage to older workers employed in white-collar professional jobs (Munnell, et al., 2006). An employer perception that older workers make "contributions to the knowledge base [raises] the likelihood that an employer will retain older workers" (Eschtruth, et al., 2007). However, views varied, depending upon the size of the organization and whether it offered defined-benefit pension plans, suggesting costs continue to drive employers' workforce considerations (Munnell, et al., 2006).

Employer-Perceived Deficits of Older Workers

When queried, employers sometimes express negative attitudes toward older workers. They "are concerned older workers may be less creative, less willing to take initiative" on the job or learn new processes or information, and less able to perform physically demanding work (Munnell, et al., 2006). Employers also express concern that older workers cost them more, and that an age/wage relationship may reflect historical seniority arrangements rather than reflecting an experience/productivity relationship. Newly-hired older workers also more rapidly accumulate defined-benefit pension amounts in contrast to younger workers, and employer-sponsored health insurance costs grow as worker age increases. As a result, "employers are less likely to train older workers, [because they] perceive there is less time to recoup costs" and improve the bottom line (Ibid.)

Recruiting, Training, and Retaining Older Workers

In a 2009 survey of Dutch employers by Mulders, et al. (2015), researchers examined employer practices related to retirement age workers and their involvement in the workforce. Such practices included transition to a position of decreased responsibility; additional training opportunities; flexible work hours; and early retirement. The study found that when organizations had trouble recruiting qualified candidates for open positions, they were less likely to hire recent retirees, but those companies with broad age-based policies were more able to meet their workforce needs.

Organizations with broad scopes of age-based HR policies are more open to employing early retirees for regular work tasks.... Firms that practice [demotion] in an appropriate way may be better able to balance the costs of older workers with their productivity levels, and therefore are better able to retain their older workers, even after (early) retirement (Mulders, et al., 2015).

New Directions for Policymakers and Employers of Older Workers

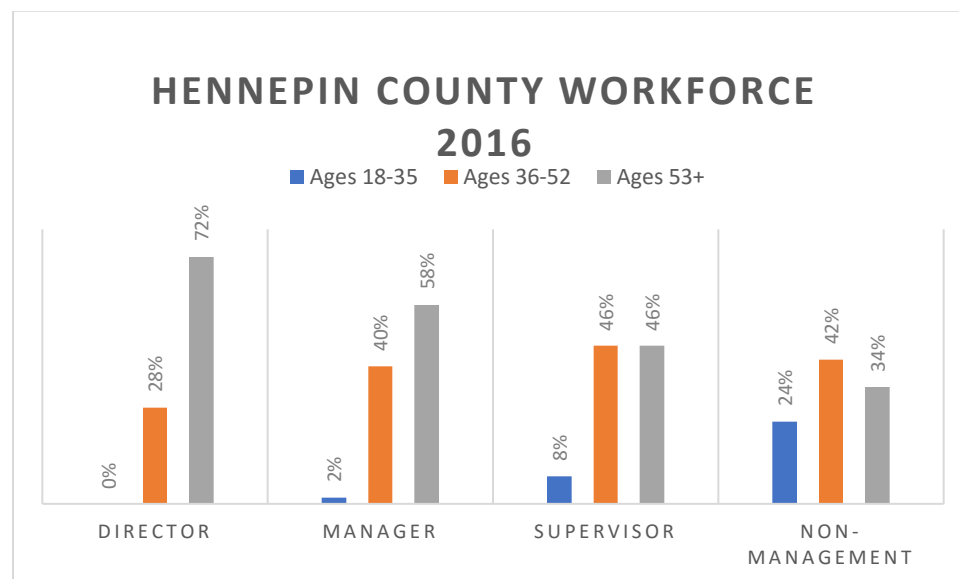
The literature supports recommendations for increasing the productivity of older workers when employers recognize the need to retain these workers. Moen (2016) describes three essential mismatches between older employees and their current work environments. She suggests employers and politicians adopt workforce policy objectives to allow Baby Boomers flexibility and control of their work schedules; exercise leadership through government advocacy at all levels; confront ageist language in the public sphere; address old customs, rules, and laws that are no longer relevant to today's retirement realities and accept new norms for retirement scenarios; and devise policies that inoculate employers and workers from employment and healthcare uncertainties. Recognizing that employer attitudes toward older workers is a relatively new interest for some, this area of study is appropriate for further strategic investment of time, energy, and financial resources.

Study Findings and Analysis

The following analysis encompasses information from the literature review, demographic data on the Hennepin County workforce, and primary data from a survey and interviews.

Research Focus: Demographics

How Many Older Workers Are There and What Do They Do? In 2016, older workers represented about 34% of the total employee workforce of 8,857 (including temporary workers) in Hennepin County, based on year-end data. Employees in leadership positions numbered 1,491, and were more likely to be older workers when compared to the workforce as a whole, especially at director- and manager-level positions (see Figure 1 for distribution of workforce ages and responsibility levels).



Source: Hennepin County Human Resources

Figure 1. Hennepin County leadership by seniority level and age group (2016 year-end data; permanent employees)

Significant Number of Retirements Expected in the Next Decade. When considering the average County retirement age of 64, year-end 2016 data show that 22% of all employees are expected to retire within five years (see Table 1). That figure increases to 32% when projecting 10 years out. Director and manager levels will be most impacted by retirements.

Table 1. 2016 Hennepin County retirement projections (excluding temporary employees).

<i>Retirement-Eligible in 5 Years</i>		<i>Retirement-Eligible in 10 Years</i>	
Directors	53%	Directors	63%
Managers	34%	Managers	52%
Supervisors	29%	Supervisors	42%
Employees	20%	Employees	30%
Total	22%	Total	32%

Source: Hennepin County Human Resources

Older Workers More Prevalent at the County than the State. Hennepin County appears to have a significantly larger percentage of older workers in its workforce than Minnesota employers as a whole (see Figure 2). Although direct comparison of data was not possible (2016 Hennepin County data include workers 53 years of age and older, while 2015 Minnesota data include workers 55 years of age and older), a general sense of the large percentage of older workers at Hennepin County was possible (Minnesota DEED, 2017).

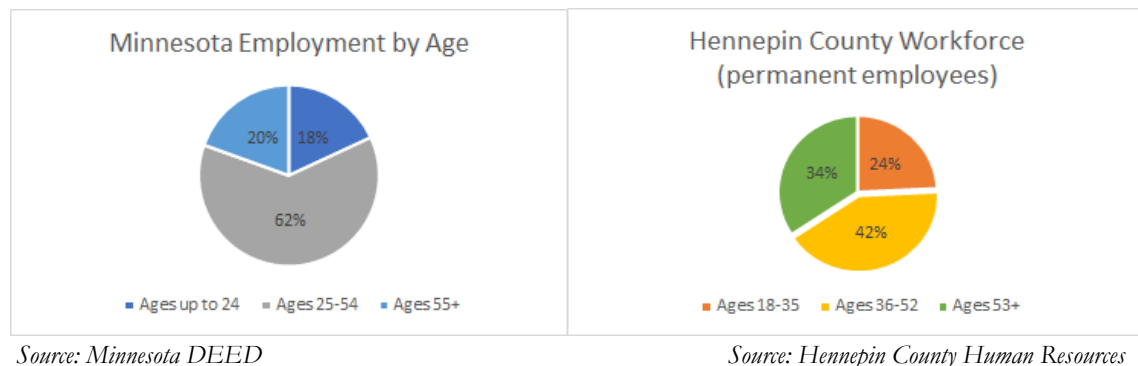


Figure 2. Minnesota employment (2015) and Hennepin County employment (2016) by age group

This study suggests the County is aware of the looming worker shortage and is working to address it. Employers in the Twin Cities and greater Minnesota may not experience the worker shortage as imminently as Hennepin County. However, analysis of the County's attitudes and employment practices with respect to older workers adds to the existing body of knowledge and can serve as a resource for the state's employers.

Hennepin County is keenly aware of the gap that will grow as the Boomer generation begins leaving the workplace. —Hennepin County survey respondent

Cultural Diversity among Leadership Positions Is Present, But Limited. County data from year-end 2016 show that 16.1% of all directors, managers, and supervisors are people of color, based on voluntary

self-reporting by employees. The supervisor category represents the greatest racial diversity (19.2%), while only 12.5% of directors and 10.7% of managers reported being people of color. While the percentage of leaders of color has varied year over year since 2010, in 2016 the County enjoyed the highest total percentage yet of leaders of color across the ensuing six years. In terms of gender, year-end 2016 data show women made up 54.9% of all director, manager, and supervisor positions in Hennepin County. Women held a majority of supervisor positions (57.1%) and manager positions (52.3%). They also held 37.5% of director positions. These percentages have not varied significantly since 2010.

Research Focus: Current Workplace

What Benefits and Challenges Do Employers Identify in Older Workers? Prior investigation into employer attitudes toward older workers, primarily undertaken by advocacy and professional groups, suggested that employers value older worker skills and characteristics in the workplace (Schramm & Wessels, 2014; Feinsod & Illiano, 2015).

Older workers have often accumulated substantial knowledge and have devised efficient ways to do their work (Munnell, et al., 2006).

To further examine employer attitudes, this study's survey asked respondents to specify which age groups represent a variety of characteristics. As more than one age group could be chosen for each characteristic (with no ranking), it was difficult to draw specific quantitative conclusions. However, it was possible to identify general findings, which could be combined with interview responses to expand understanding of employer attitudes.

Older Workers — Loyal, Professional, and Committed to Quality Work. The survey included several questions designed to discern attitudes of Hennepin County leadership toward older employees' workplace practices. Data reflected County management views that a greater number of older workers (ages 53–71) possessed strong leadership skills when compared to younger workers, in addition to high levels of loyalty, professionalism, and commitment to producing quality work (see Figure 3 for survey respondents' views of workers' characteristics and work habits relative to other employee age groups).

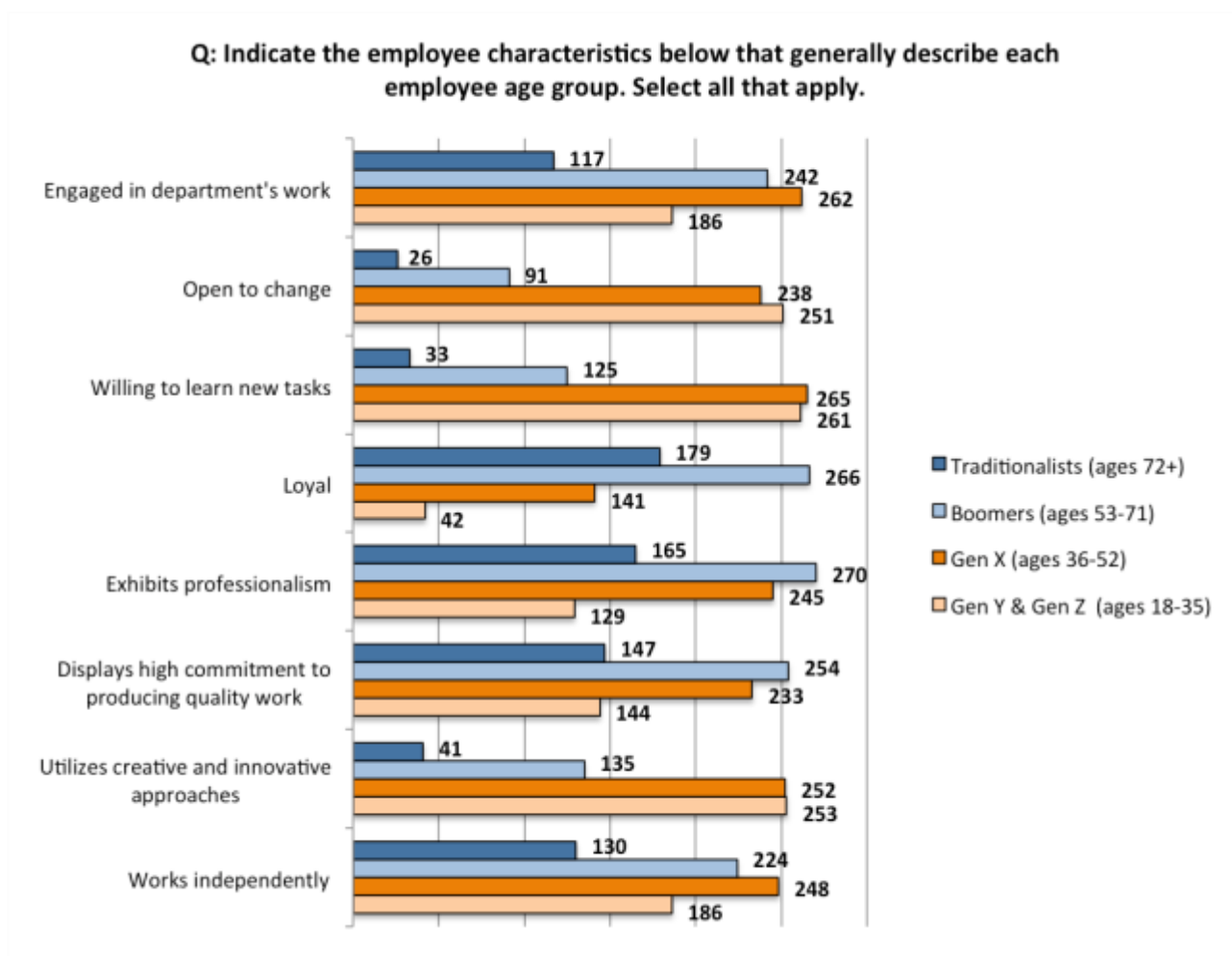


Figure 3. Leadership perception of characteristics by generation (survey question #5)

These characteristics are important to the workplace, as they may be identified as part of overall worker engagement with the goals of the County organization and with its fellow employees. Business analysis over a period of years has suggested that high levels of employee engagement result in higher profitability and productivity (Sorenson, 2013). Hennepin County leaders view older workers favorably, and value their contributions to business unit achievements and organization goals. It should be noted that survey results reflected a leadership perception that fewer employees in the oldest age group (ages 72+) were engaged in a department's work, were receptive to change, or willing to learn new tasks and use creative approaches. This pattern could perhaps be explained by the part-time or project-based nature of the oldest employees' positions, their very small numbers within the County workforce, and/or managers' lack of familiarity with workers in that particular group.

Work Ethic and Reliability — Equal, But with a Caveat. With regard to a strong work ethic and worker reliability, the survey data suggested Hennepin County leaders generally believe older and younger workers share equally strong work ethics and are equally reliable. Interestingly, a higher percentage (55%) of older respondents in the survey said older workers are more likely to have a strong work ethic, while 56% of

younger workers (ages 18–52) said younger and older workers hold an equally strong work ethic. Some interview responses, while not directly discussing work ethic and reliability, voiced a concern that younger workers are more focused on career advancement than they are on the organization’s goals. Overall, older leaders said they believe younger workers are less committed to their work than older workers.

I do worry about commitment — do we have people who are committed to the jobs enough to be effective? Will we have enough people in the door who aren’t just chasing the next opportunity or the next dollar? — Hennepin County interview respondent

Learning and Applying New Skills: The Data Are Mixed. Survey responses reflected literature findings regarding technology and older workers. Just 1% of respondents indicated they believe older workers are more likely to apply new technology to work tasks, while 24% said older and younger workers are equally likely to apply new technologies. However, half of older leadership (53+) said younger workers are more able to learn new skills, while the remaining half said they felt younger and older workers are equally able to learn new skills. Interview data were more nuanced, suggesting Hennepin County leadership views older workers as able to learn and apply new technology. Survey respondents acknowledged that the challenge includes a need for varied training approaches for different generations of workers.

Human resources personnel or other informants...report that, contrary to conventional wisdom, the older workers in their organizations are receptive to new technologies. Initial training as well as continuing support and assistance help older workers adjust to new work systems and technologies (Moen, et al., 2017, p. 7).

While some leaders said older workers are challenged by the frequency and pace of change, others noted that the pace of change is a challenge for *all* ages.

People sometimes don’t want to change—change is hard. [But] it’s what we’re all about. We’re about change. We’re moving toward a more efficient and effective way of doing business with a client-centered department [and a] helping and healing mentality. If you’re stuck in your ways and not adaptive to change, then you’re not willing to accept the new philosophy. —Hennepin County interview respondent

Some interviewees disagreed with the survey results. More than one suggested survey respondents may have been swayed by the stereotype of older workers struggling with technology, rather than reflecting actual workplace experiences. One County leader noted in an interview that his work group comprised employees ranging from their twenties through their seventies, all working on computer tablets to collect data in the field without difficulty.

Young people have grown up with technology...but that doesn’t mean that someone who didn’t grow up with it doesn’t have creative and innovative ideas about how we could transform our work. —Hennepin County interview respondent

Experience, Maturity, and Resilience Are Benefits. Survey and interview respondents pointed to older workers’ experience, maturity, and resilience as important to the County’s work. Interviewees also suggested older workers are focused on relationships and less interested in competition among peers.

I think [older workers] bring maturity. A word we use here from time to time is “caution”—you can’t fly through the work...[at] the speed of light. You have to have some caution to make sure that what you’re doing is absolutely correct. —Hennepin County interview respondent

Mentoring, Customer Service, Effective Communication Are Valued. Survey and interview responses, backed by literature findings, point to older workers’ willingness to mentor and advise younger workers and new hires, provide effective customer service to clients across various lines of business, and use effective communication techniques in the workplace (see Figure 4). While respondents said older workers generally reflect these qualities to a greater degree than younger workers, the older worker’s ability to provide unobtrusive, “incognito” mentoring (as one County leader phrased it) can be invaluable to the team and contribute to relationship-building and an understanding of the benefits of an age-mingled workplace.

...one of the things I’m really having fun with is mentoring a Millennial who is really smart, but doesn’t know how to navigate institutions and systems. —Hennepin County interview respondent

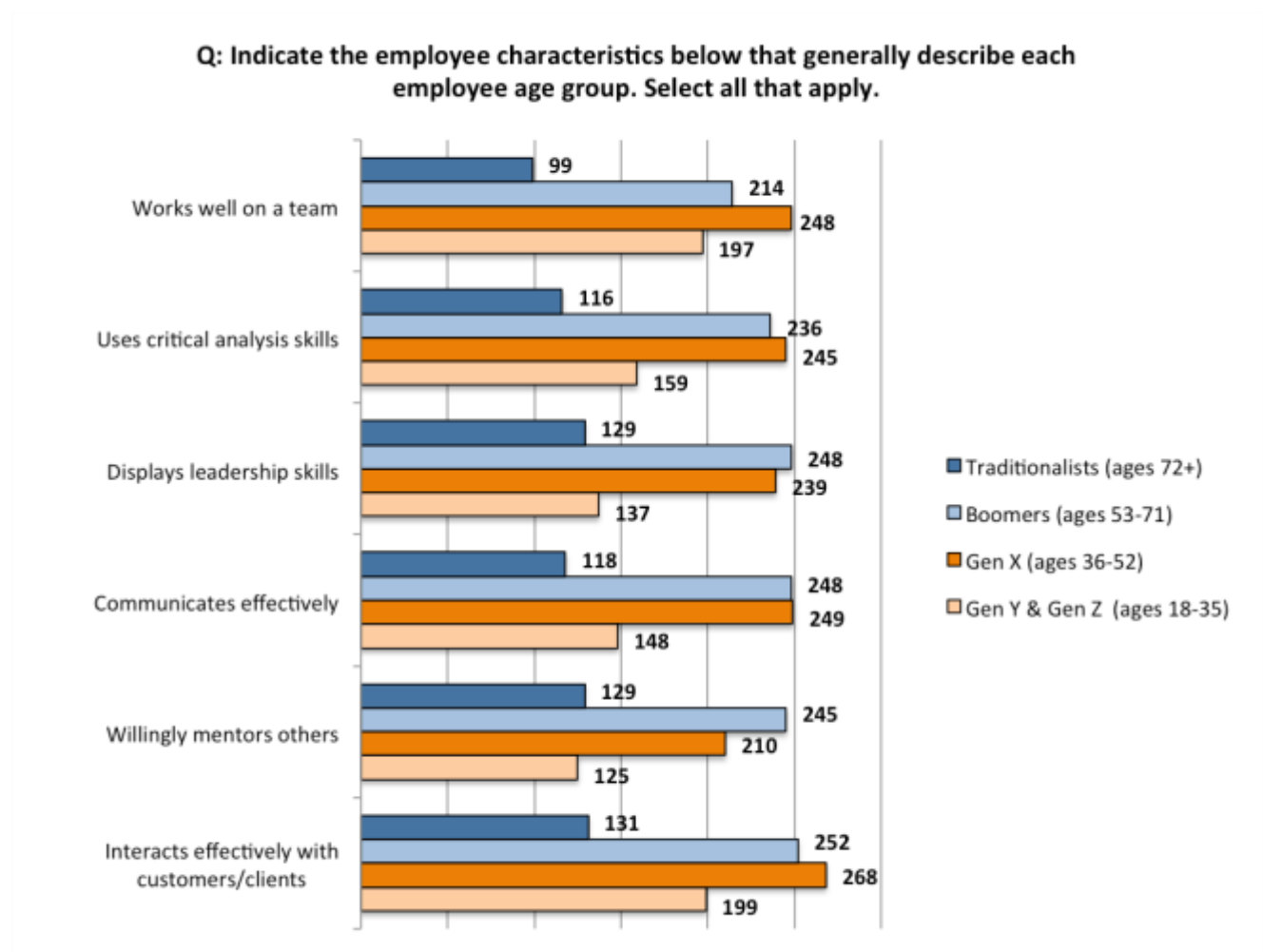


Figure 4. Leadership perception of characteristics by generation (survey question #4)

Older Workers — Productive on the Job and A Workforce Benefit through Age Diversity. Older worker productivity is admired by Hennepin County leaders, a finding that emerges in both survey and interview comments. Through phased retirement, older workers can and do provide Hennepin County with continued productivity. They also serve as a workforce “bridge” to younger workers, while gradually transitioning to reduced and/or new roles. Kulik, Perera, et al. (2016) cite research about the benefits of mixed-age groupings in the workplace, asserting that “organizations offering identity conscious diversity practices benefited from higher productivity and workplace innovation, and lower voluntary employee turnover.” Interviewees echoed the value of mixed-age groupings in their areas:

I can speak for our managerial team, which includes Millennials, X/Ys, and Baby Boomers — we are open and inclusive to any age group. They all bring something to the table that is beneficial to create a better [workplace product]. —Hennepin County interview respondent

Survey results reflected findings about older worker productivity at Hennepin County. When asked about a commitment to producing quality work, the majority of respondents (54%) considered employees ages 53+ to display such commitment. When specifically asked about worker age groups that were productive, survey respondents affirmed older worker productivity, and indicated both older and younger groups were equal.

Boomer generation employees can continue to contribute and support the organization, allowing some overlap for the Gen Y and Gen Z employees to develop, grow, and mature in respect to their roles and responsibilities. —Hennepin County interview respondent

Survey results reflected leaders’ interest in encouraging various types of phased retirement/reduced workload accommodations that not only benefit the employee, but also benefit the manager and department in terms of continued work production and knowledge transfer. One County leader stressed the value of continuing to offer opportunities for advancement and compensation to older workers, rather than asking them when they plan to retire or sidelining them to less meaningful work. In a 2016 Australian study of 666 employers, Kulik, Perera, et al. (2016) found that employers who offer “high-performance practices” — through ongoing skills-training opportunities, age-diverse work groups, and diversity of ages represented across managerial levels — subsequently increase their organizational productivity for *all* workers and see results in higher employee engagement.

A fully engaged employee delivers the full value of his or her salary; a disengaged or semi-engaged employee might deliver only 60–80% (Kulik, Perera, et al., 2016).

The Challenges of Elder Parent Care and Physical Limitations. Older workers sometimes face significant workplace challenges related to their aging parents’ care or their own physical changes that may require work schedule and task accommodations. Among various factors affecting labor force participation cited by the Minnesota State Demographic Center are these “social factors such as health and disability challenges” (2013).

In jobs that are very physically demanding... there does come a point where that ability just isn't as effective as it was before...it's really working with them to say, "Okay, is there a way to adapt? If not, what would you want to move to?" and working them towards it. —Hennepin County interview respondent

However, interview participants were also quick to point to the equally challenging childbearing/child-rearing years for some younger workers, requiring schedule accommodations as well.

I see a lot of people in their 20s and 30s struggling with day care and sick kids, you just don't have those struggles with older workers. ...Older workers don't have people getting ear infections. Older workers are almost better equipped, they don't have as many pressures outside of work. —Hennepin County interview respondent

Research Focus: Future Workplace

Attracting and Retaining Older Workers: What Skills Are Needed? As a prelude to exploring future workforce needs, this study first examined the current ease or difficulty of finding qualified employees in Hennepin County. When asked about their experiences over the past five years with recruiting and hiring new employees, about half (52%) of survey respondents said it was *Easy* or *Somewhat Easy* to attract and hire employees who meet the job requirements they are seeking. Meanwhile, 41% said it was *Difficult* or *Somewhat Difficult* to attract and hire employees who meet job requirements. The remainder of respondents reported having no experience recruiting or hiring new employees in the past five years. Surveys and interviews revealed that in technical areas, managers struggle to field a substantial number of qualified applicants for positions, stressing salary competition with industry competitors. However, in areas where customer service was an essential part of the position, the reverse trend was noted, with each advertised opening attracting hundreds of applicants.

Communication, Relationships, Leadership, Management Skills Are Needed. Interviewees said it was important for future workers to have leadership skills that focused on helping the County and its services evolve with the changing needs and diversity of the people it serves. From Public Works to Corrections, communication and relationship-building were cited as important skills for the County employee of the future.

It's absolutely essential for us that people come in and are capable of carrying on a meaningful conversation with the public we serve. —Hennepin County interview respondent

Customer service, managerial skills, and leadership abilities were all cited as essential to the County's future work.

I need somebody who walks into that [managerial] level that's really good at hiring, that really knows how to recognize talent and utilize talent and rebuild teams, because they're all going to have to be rebuilt. —Hennepin County interview respondent

While 98% of survey respondents said they considered it important for employees to have the specific skills necessary to do their jobs at the time of hiring, responses also suggested that leaders are receptive to employees learning additional skills after being hired. More than two-thirds of survey respondents considered it acceptable for employees to gain necessary skills through either formal on-the-job training or by other means (e.g., informal skill-based experiences gained outside the workforce or from prior training completed before taking the job). Formal online skills training was considered acceptable by half of the respondents.

It's far easier to train somebody to use a cash register or shelve a book or read a demographic report than it is to train them to be self-aware and have empathy. —Hennepin County interview respondent

Additional Messaging Needed to Address Future Worker Gap. Although the County has generally met its need for new employees, Hennepin County leadership has been forward-looking in anticipating significant changes in its workforce. A small majority of leaders who participated in this research acknowledged the efforts underway within the County to address the upcoming worker shortage.

They've been...energetic in their trying [to recognize the issue, warn and raise consciousness, and express a commitment to bring people in]. —Hennepin County interview respondent

When asked, “Have you or your department planned for the expected shortage?” 56% of survey respondents answered *Yes*. Still, based on the 44% who replied *No* (and at least one interviewee who expressed a lack of awareness about how the county is responding to the challenge), more communication of the complete story could be beneficial.

I think what I'm really pleased about is, we recognized this 10 years ago, we knew it was coming We actually jumped on it right away. —Hennepin County interview respondent

Meeting Future Department Demands with Older Workers. Hennepin County leadership views older workers as a resource and as part of the solution for addressing the expected worker shortage (see Figure 5).

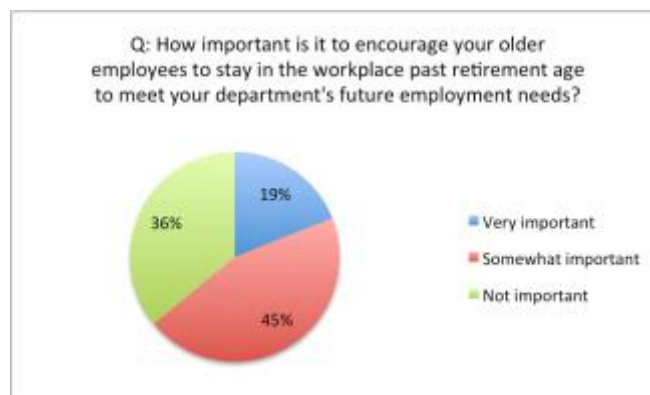


Figure 5. Importance of older workers remaining in the workplace (survey question #10)

Nearly 64% of survey respondents said it is either *Somewhat* (45%) or *Very Important* (19%) to encourage older employees to stay in the workplace past retirement age to meet future departmental needs. About one-third said it would not be important to do so (36%), with results varying by respondent age group.

[When] the group that's retiring [is gone], there's going to be nobody here to mentor and ...pass on information, so it will be a lot of people having to kind of make up new rules as they go. —Hennepin County interview respondent

A majority of leaders surveyed (about 82%) said that when they consider their future labor needs, they are *Moderately* (53%) or *Very Likely* (29%) to consider hiring an employee who has previously retired, whether from their own department or from an outside workplace.

I think that the biggest challenge will be...to find the work that will fit schedules. Not everybody wants to launch a second career after retirement, so [it's important to find] those initiatives that [have] flexible hours. I think people need to look at flexible locations, [and ask] "OK, so you're wintering in Florida, how can we still utilize you?" —Hennepin County interview respondent

Current Approaches to Attract and Retain Older Workers. Hennepin County's approach to attract and retain older workers involves offering increased workplace flexibility and improved communication about County benefits. Phased retirement, use of part-time project managers, and limited duration contracts are employment approaches County leadership employs to encourage older workers to remain or return to the County during traditional retirement years. Both interview and survey respondents believed that older workers also respond to the flexible work schedules and ability to work remotely that are now commonplace within the County. The County's *Total Rewards* program, a customized dashboard that highlights workplace benefits enjoyed by County employees, was viewed as a particularly positive form of employee communication. The dashboard received compliments from a number of survey and interview respondents.

I like what's been happening, particularly under Michael Rossman's leadership. He's done a lot more communicating with staff around things that HR is developing, like the Total Rewards program, a new way to look at benefits, pulling a number of things together. —Hennepin County interview respondent

Hennepin Survey Respondents Receptive to Increased Workplace Flexibility. More than half of survey respondents said they would be willing to accommodate increased flexible or varied work hours and nontraditional work roles to encourage employees to stay in the workplace past retirement age. When asked to suggest accommodations that respondents would support to encourage older workers to continue working, leaders' responses could be grouped into three key areas (all of which are currently underway at Hennepin County):

- Change some work requirements and benefits to appeal more to older workers.
- Increase flexibility in work schedules.
- Communicate that older workers are valued and will continue to have opportunities.

Valuing Older Employees’ Institutional Knowledge Is Important. Hennepin County’s engagement in this issue reflects some commonality with employer practices cited in the literature review. According to Eschtruth, et al. (2007), “companies are more likely to accommodate older workers if they value older workers’ institutional knowledge and/or have older workforces.” In addition, companies with broad age-based policies are “more open to employing early retirees for regular work tasks” (Mulders, et al., 2015).

Stop talking about age and start talking about capabilities. —Hennepin County survey respondent

Additional accommodations — whether related to ergonomics, work scheduling, paid time off, or FMLA —and celebrations of long service to the County, including years of service gifts, employee gatherings, and personal recognition for individuals’ contributions to the workplace are also viewed as helpful to attracting and retaining older workers.

The literature noted multiple recommendations for increasing older worker productivity when employers recognize the need to retain these workers. Moen (2016) finds three essential “mismatches” between older employees and their present work environments—work/time, life/course, and understanding risk/safety. Her suggestions and Hennepin County’s actions align well, further supporting Hennepin County’s leadership in this area.

Perception: The Cost and Effort of Hiring Older Workers. While some researchers suggest employers may be less likely to pursue older job applicants for interviews than they would be to recruit younger applicants with identical profiles and skillsets (Lahey, 2005), Hennepin County’s experience diverges from this perception. On one hand, the Federal Reserve Bank of San Francisco found that employers were more hesitant to hire older workers than they were to retain older workers already in the workplace. Employers expressed a sense that there was less time to recoup recruiting, hiring, and training costs after hiring older workers, and felt it was more difficult to terminate underperforming older workers because of mandates in the U.S. federal Age Discrimination in Employment Act (ADEA) (Neumark, et al., 2017). However, in contrast, Hennepin County leaders in both the survey and interviews expressed openness to hiring or rehiring older workers and absorbing any additional training costs, perhaps in recognition of the worker shortage and their view of older workers as a genuine resource to the County.

The Good News: Efforts Align for Workers of All Ages

A number of recruitment and retention efforts in Hennepin County align across current and potential employee age groups (e.g. flexible work time and place, increased communication through the “Total Rewards” program, mentorship and training, and others). In other words, these practices are believed to help attract and retain not only younger workers, but older workers as well. Moen, et al. (2015) found these efforts were consistent with the approaches of other employers that were studied across multiple sectors, including many in Minnesota. In 2017 research, Moen and colleagues found that among employers, “most surprising is that the innovative policies reported for older workers are in fact designed for opening up options for workers of all ages, not just older workers” (Moen, et al., 2017, p. 6).

Recommendations

The Minnesota State Demographic Center emphasizes the reality of demographic trends, urging policymakers, employers, and community members to make strategic choices that will help the state build a strong workforce and maintain a high quality of life. State demographers urge employers to create flexible work arrangements, including part-time positions, job-sharing, and flexible, phased retirement options for older workers (Minnesota State Demographic Center, 2013). The findings of this study reveal good news: most successful retention and recruitment efforts benefit older workers, as well as younger workers. In many cases, a solid foundation of work is already underway.

Recommendations for the Minnesota Board on Aging and Hennepin County to continue progress on addressing the workforce gap were evaluated, and trade-offs were considered by seeking feedback from the two organizations and by applying the following criteria:

- **Efficiency** — Will the recommendation maximize the public good while minimizing the time and financial resources required to achieve success?
- **Organizational mission** — Does the recommendation fit within the organization’s goals and vision?
- **Cultural fit** — Does the recommendation make sense, given the way in which the organization works?
- **Feasibility** — Is the recommendation realistic, given the external issue environment?

Minnesota Board on Aging Recommendations

The following recommendations are designed to align with the Minnesota Board on Aging’s mission. While they are specifically for consideration by the Minnesota Board on Aging, the research team hopes the recommendations will not only be useful, but will also spark thoughtful conversations among policymakers and employers across Minnesota in a variety of businesses, nonprofit organizations, and other public service settings.

1. Support policies that benefit older workers.

- Prioritize advocacy for older workers as a strategic direction.
- Continue as a leading voice of Minnesota seniors with the Governor and State Legislature.
- Focus policy provisions on lower income workers — those who will need to remain in the workplace during traditional retirement years.

2. Advise partners on the workplace shortage and opportunities for employers to utilize older workers.

- Enhance the Board’s thought leadership role. Share research results at public speaking opportunities, conferences, and meetings with partner organizations and policymakers.
- Lead development of a common language about the value of older workers, and share it with the Board’s partners to minimize stereotypes and ageism.
- Support workforce opportunities for both older workers and employers. Consider partnering with a retiree business executive organization such as SCORE (score.org), a U.S. Small Business Administration program that provides education and mentorship to small businesses.

Other partnership opportunities might include the Minnesota Chambers of Commerce; agricultural and manufacturing trade associations (e.g. Enterprise Minnesota); financial institutions (e.g. accounting firms, financial planners, insurers); and Minnesota Department of Employment and Economic Development Workforce Centers (www.minnesotaworks.net).

3. Continue to leverage the Board on Aging’s research relationship with the University of Minnesota.

- Focus research on employer and older worker needs and priorities. Identify benefits and workplace accommodations that can create conditions for optimal productivity.
- Identify research opportunities and challenges involving older Minnesotans among nonprofit, for-profit, and other public-sector employers. Focus on the state’s rural vs. urban divide, as well as recent immigrant populations and barriers faced by older workers in the workplace.

Hennepin County Recommendations

This study showed that Hennepin County leadership recognized early the potential impact of Boomer retirements and invested significant effort to mitigate potential disruptions. County leaders acknowledge that older workers provided experience and skills to help the County provide the services residents expect and need. The County is a leader in encouraging and supporting older workers in the workplace. The following recommendations are designed to align with Hennepin County’s mission and vision, while building on the work already underway.

1. Celebrate older workers’ value.

- Continue to communicate and celebrate the value of past work experiences and current expertise of older workers. Publicize their career highlights across a variety of media platforms.

2. Clarify work expectations.

- Develop conversation guidelines for returning older workers and their managers to clarify employee responsibilities and new work tasks.
- Acknowledge differences between part-time and full-time responsibilities.
- Address importance of ensuring current employees are aware of older workers' institutional knowledge and history.

3. Encourage two-way mentoring opportunities.

- Continue to place older workers where their work experiences, existing relationships, task knowledge, and “big picture” grasp will benefit younger workers.
- Encourage older workers to be receptive to learning from the skills and knowledge of younger workers.
- Consider partnering with an organization such as SCORE to create a pool of interested older workers who mentor less experienced employees across various lines of County business.

4. Continue communication regarding the worker shortage and successful solutions.

- Continue intergenerational teamwork training to promote understanding and greater respect among all employees.
- Lead development of a common language about the value of older workers to minimize stereotypes and ageism.
- Change “succession planning” terminology to more broadly encompass personal and professional goal-setting, using language as a way to focus on all work transitions.

Conclusions

Based on findings from this study, Hennepin County recognizes the opportunity and value that older workers provide toward meeting the County's mission and goals. As more employers similar to Hennepin County face worker shortages, they will need to be increasingly creative, both in applying productivity improvements and addressing recruitment and retention of employees.

The value of older workers to employers may continue to grow as workers display a deeper understanding of employers' missions, enthusiastically demonstrate skills and attributes gained through years of work experience, and show a sustained commitment to the organization and a continued development of their own leadership skills. It will also be important for employers to understand older workers' motives for continued workforce participation. Some older Minnesota workers will continue to work beyond typical retirement age to cover basic living expenses, while other workers will have the ability to make work decisions based upon a desire to remain productive or an interest in contributing to an organization that fits their personal values.

Addressing the looming worker shortage will require continued focus if Minnesota's economy is to remain vibrant. To ensure adequate numbers of employees in the next decade, Minnesota employers will need to offer compensation and benefits to attract and retain older workers. This will mean more flexible work schedules, benefits that may include health insurance, at least for those who have not yet reached Medicare-eligibility age, the possibility of working remotely, and other flexible workplace offerings.

Further study on employer attitudes toward older workers is recommended, including work to gather data from non-government sectors and employers whose leadership levels are not dominated by older workers. Additional research on urban and rural attitudes toward older workers and research to determine if there are differences in employer attitudes toward minority populations would also be beneficial. In addition, an important area of needed research is to study the interest of older workers in continuing their employment past traditional retirement ages, and what might be needed to induce them to continue working.

Acknowledgments

We are grateful to many individuals and their organizations for their support and work on behalf of this project. First, we were fortunate to conduct this work on behalf of the Minnesota Board on Aging. Kari Benson, Executive Director, and her colleagues at The Board provide important leadership and counsel to Minnesota policymakers and others on behalf of the entire state, and her engagement on this project exemplified that leadership. Mary Jo Schifsky, our liaison to The Board, inspired us throughout this work with her passion and commitment to this topic. Thank you both for being our partners.

The comprehensive nature of this work, despite our time constraints, was possible only because of Hennepin County's full involvement as our research partner. To Hennepin County Administrator David Hough: thank you for hearing our proposal and supporting the County's involvement. Hennepin County's Human Resources Department, under the direction of and with support from Chief Human Resources Officer Michael Rossman, provided data, was responsive to our questions, and welcomed a critical role in this research: access to the County's leadership. Kelly Tanzer, Deputy Chief Human Resources Officer, and her colleagues Susan Indarte, Senior Administrative Assistant, and Luanne Laurents, Human Resource Manager, were helpful, gracious, and patient in response to our requests and questions to clarify information. And of course, this study was possible because of the hundreds of County administrators, directors, managers, and supervisors who participated in our research.

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Last, but not least, to our families and friends: this capstone represents only a limited amount of the patience, support, and encouragement you have provided us throughout our MPA program experiences. Thank you for playing such significant roles in all of our successes.

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Appendices

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- Appendix B. Minnesota Board on Aging Capstone Survey Questions
- Appendix C. Survey Coding Results (Two Free-Response Questions)
- Appendix D. Survey Question Cross-Tabulation Samples
- Appendix E. University of Minnesota Email to Potential Interview Subjects
- Appendix F. Institutional Review Board Study Participant Agreement
- Appendix G. Hennepin County Leadership Interview Questions
- Appendix H. Interview Coding Results (Fourteen Questions)
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Appendix A. Hennepin County Email to Survey Recipients

HENNEPIN COUNTY MINNESOTA

Hello managers and supervisors,

Graduate students at the University Minnesota Humphrey School of Public Affairs are working with the Minnesota Board on Aging to explore employer attitudes toward older workers in Minnesota. This information will be particularly valuable in light of the expected worker shortage over the next decade.

Please take this brief anonymous survey by **Wednesday, June 14, 2017**, in support of their study.

As partners to this work, the Minnesota Board on Aging and Hennepin County will consider the survey results in aggregate when we make future policy recommendations.

Your participation also reinforces our long-time partnership with the University and strengthens connections around shared goals.

Thanks for your help,

Michael Rossman
Chief Human Resources Officer

Appendix B. Minnesota Board on Aging Capstone Survey Questions

Thank you for taking this survey conducted by graduate students from the University of Minnesota's Humphrey School of Public Affairs, in conjunction with the Minnesota Board on Aging and Hennepin County. The survey explores employer attitudes toward older workers in light of an expected worker shortage over the next decade. Responses will be reported anonymously, combined in the final study report, and provided to the Minnesota Board on Aging, Hennepin County, and the Humphrey School of Public Affairs.

1. Over the last five years, what has been your experience with recruiting and hiring new employees? (Select one.)
 - ☐ Easy to attract and hire employees who meet the job requirements
 - ☐ Somewhat easy to attract and hire employees who meet the job requirements
 - ☐ Somewhat difficult to attract and hire employees who meet the job requirements
 - ☐ Difficult to attract and hire employees who meet the job requirements
 - ☐ Haven't had to recruit or hire new employees

2. When considering technical skills needed in your area/department (e.g. specific skills required in your line of work), how important is it for your employees to have those technical skills at the time of hire? (Select one.)
 - ☐ Not at all important
 - ☐ Moderately important
 - ☐ Very important

3. When considering your employees' technical skills, how can those skills be acquired? (Choose all that apply.)
 - ☐ Through informal on-the-job skills training
 - ☐ Through formal on-the-job skills training
 - ☐ Through formal online skills training
 - ☐ Through other means (e.g. informal experience outside workplace or prior training before taking the job)

4. Please indicate the employee characteristics below that generally describe each employee age group. Select all that apply.

	Gens Z & Y (ages 18-35)	Gen X (ages 36-52)	Boomers (ages 53-71)	Traditionalists (ages 72+)
Works well on a team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uses critical analysis skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Displays leadership skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Willingly mentors others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interacts effectively with customer/clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Committed to Hennepin County's mission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Please indicate the employee characteristics below that generally describe each employee age group. Select all that apply.

	Gens Z & Y (ages 18-35)	Gen X (ages 36-52)	Boomers (ages 53-71)	Traditionalists (ages 72+)
Works independently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Utilizes creative and innovative approaches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Displays high commitment to producing quality work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exhibits professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loyal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Willing to learn new tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open to change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engaged in department's work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. As you consider the current employees you manage, please compare the characteristics of older workers (ages 55+) with younger workers (ages 18-54) when responding to the following statements.

	Older worker is less than younger worker	Older worker is equal to younger worker	Older worker is more than younger worker
Reliable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has strong work ethic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applies new technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Able to learn new skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Productive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Please characterize the work schedules available to your employees. (Choose all that apply.)

- ☐ Start/stop times are adjustable at the workplace
- ☐ Start/stop times are adjustable while working remotely
- ☐ Rigid start/stop times at the workplace
- ☐ Rigid start/stop times while working remotely

8. The Minnesota Dept. of Employment & Economic Development projects a labor shortage over the next 5-15 years. Have you or your department planned for the expected shortage?

- ☐ No
- ☐ Yes

[Answering 'Yes' to question 8 prompted a segue to question 9.]

9. Since you answered 'Yes' on the previous question, please provide detail regarding your department's planning for expected retirements. (*Free response.*)

10. How important is it to encourage your older employees to stay in the workplace past retirement age, in order to meet your department's future employment needs?

- ☐ Very important
- ☐ Somewhat important
- ☐ Not important

[Answering 'Very important' or 'Somewhat important' to question 10 prompted a segue to question 11.]

11. Which of the following accommodations would you support in order to encourage employees to stay in the workplace past retirement age? (Choose all that apply.)

- ☐ Flexible or varied work hours
- ☐ Working remotely
- ☐ Non-traditional work role (e.g. contract or project work)
- ☐ Training opportunities to update skills
- ☐ Other

[Answering 'Other' to question 11 prompted a segue to question 12.]

12. Describe the accommodation you would support to encourage employees to stay past retirement age. (*Free response.*)

13. As you consider your area/department's future labor needs, how likely are you to consider hiring an employee who has previously retired (whether from your own department or from an outside workplace)?

- ☐ Not likely
- ☐ Moderately likely
- ☐ Very likely

14. How would you describe your gender?

- ☐ Female
- ☐ Male
- ☐ Other

15. What is your current age?

- ☐ 18-35 years
- ☐ 36-52 years
- ☐ 53-71 years
- ☐ 72+ years

16. Please specify your race or ethnicity. (Select one.)

- ☐ Hispanic or Latino
- ☐ Black or African American
- ☐ American Indian, Alaskan Native
- ☐ Asian, Hawaiian
- ☐ White
- ☐ Multi-race

Appendix C. Survey Coding Results (Two Free-Response Questions)

The research team's survey of 16 questions was distributed to Hennepin County's 1,491 leaders, and was completed by 297. It contained a variety of question types. Included were two free-response questions that were triggered by certain choices made when answering immediately preceding multiple choice questions. The two open-ended questions are listed below (Q#9 and Q#12), along with a summary of answers given by survey respondents. These answers have been grouped and coded by theme.

Q9. The Minnesota Department of Employment and Economic Development projects a labor shortage over the next 5–15 years. Have you or your department planned for the expected worker shortage? If yes, please provide detail regarding your department's planning for expected retirements.

1. Internal support to retain/promote from within.

- Training/coaching
- "Total Rewards" dashboard – highlights benefits so workers can compare/appreciate
- Mentoring of younger/newer employees by older employees
- Increase pay in hard-to-recruit positions

2. Expand/increase potential supply of newer/younger workers.

- Increase/expand connections to colleges, universities, tech schools, community organizations
- Change qualifications to reduce barrier to entry
- Encourage work culture that appeals to younger workers

3. Use technology to increase productivity.

4. Encourage communication and engagement of staff over idea of worker shortage.

- Allow/encourage new ways of doing things
- From one survey respondent: Too much emphasis on younger workers, leading to devaluing/discriminating against older staff. "HC efforts.... have gone to extreme lengths, so much so that they have alienated some of the older workforce, making them feel underappreciated and devalued."

Representative Responses

"Hennepin County attempting to develop work culture that caters to younger workers."

"Some training needed on generational differences."

"Looking for potential rather than credentials." (i.e. changing County criteria for job openings)

"We will rise to the occasion." (County provides opportunities to find new ways to do things and gives opportunity to younger workers to move into leadership positions)

Q12. Describe the accommodation you would support to encourage employees to stay past retirement age.

1. Change workforce environment to accommodate older workers.

- Reduce workload
- Allow part time hours with benefits, especially health insurance
- Change work emphasis from daily/technical tasks to include more mentoring and transfer of knowledge
- Shorter work day

2. More flexibility, less emphasis on compensation.

- Allow more time off (for example, to visit grandkids or go south for winter)
- Job sharing
- Shorter work week or shorter work day
- Ability to accelerate amount of vacation/time off for older workers

3. Better communication: Older workers are valued and still have opportunities.

Representative Response

“Stop talking about age and start talking about capabilities.”

Appendix D. Survey Question Cross-Tabulation Samples

Q1. Hiring experience in the past 5 years + Q15. Respondent Age Group

Q1. Over the last five years, what has been your experience with recruiting and hiring new employees?	Q15. What is your current age?				Total
	18-35 years	36-52 years	53-71 years	72+ years	
Easy to attract and hire employees who meet the job requirements	5	32	25	2	64
Somewhat easy to attract and hire employees who meet the job requirements	8	34	48	1	91
Somewhat difficult to attract and hire employees who meet the job requirements	3	31	50	0	84
Difficult to attract and hire employees who meet the job requirements	2	16	20	0	38
Haven't had to recruit or hire new employees	1	10	7	0	18
Total Respondents	19	123	150	3	295

Q2. Technical Skills at Time of Hiring + Q15. Respondent Age Group

Q2. When considering technical skills needed in your area/ department (i.e. specific skills required in your line of work), how important is it for your employees to have those technical skills at the time of hire?	Q15. What is your current age?				Total
	18-35 years	36-52 years	53-71 years	72+ years	
Not at all important	3	2	1	0	6
Moderately important	10	52	64	2	128
Very important	6	69	85	1	161
Total Respondents	19	123	150	3	295

Q5. Employee characteristics that generally describe each age group + Q15. Respondent Age Group (two samples)

Q5. Please indicate which employee age group is generally described by the employee characteristics below. (Select all age groups that apply to each characteristic.)		Q15. What is your current age?				Total
		18-35 years	36-52 years	53-71 years	72+ years	
Displays high commitment to producing quality work <i>(p-value = 0.43)</i>	Gen Y Gen Z (18-35)	14	58	69	3	144
	Gen X (36-52)	16	102	111	3	232
	Boomers (53-71)	15	98	136	3	252
	Traditionalists (72+)	12	54	77	3	146
	Totals	16	117	144	3	262
Loyal <i>(p-value = 0.03; a statistically reliable result)</i>	Gen Y Gen Z (18-35)	7	20	14	1	42
	Gen X (36-52)	6	73	60	2	141
	Boomers (53-71)	16	108	136	2	264
	Traditionalists (72+)	13	74	88	3	178
	Totals	18	115	143	3	279

Appendix E. University of Minnesota Email to Potential Interview Subjects

Hello, Ms./Mr. [name]:

I'm following up on the recent email you received from Michael Rossman about the research project being conducted by students of the University of Minnesota's Humphrey School of Public Affairs.

My colleagues and I are exploring workplace attitudes toward older workers, especially in light of an expected worker shortage over the next decade. We'd very much like to get your perspective, so I'm wondering if you might be available to meet sometime over the next few weeks to chat about this subject. Your participation will be confidential and your responses will not be identifiable to you in our final report.

I expect our meeting to last a maximum of 45 minutes as I'll have about a dozen questions to ask. I could come to your office or meet somewhere else that is convenient for you. We've found that in-person interviews are the most effective, but we could talk on the phone if you are unable to schedule a time to meet in person.

If you're willing to participate, please send me some times and dates that might work for you, between now and July 11, and let me know where your office is (or where you'd like to meet). I'm also willing to meet early mornings or early evenings. Many thanks for your consideration. I look forward to hearing from you soon.

If you do not recall getting the information about this request, or if you have any other questions, feel free to contact Kelly Tanzer kelly.tanzer@hennepin.us.

Regards,

[Student Name]

University of Minnesota Humphrey School of Public Affairs

Master of Public Affairs 2017 Candidate

[Contact Info]

Appendix F: Institutional Review Board Study Participant Agreement

INTERVIEW CONSENT FORM Interviewee's Comments NOT for Attribution PA 8081 Humphrey Student Capstone Workshop

You are invited to participate in a research study conducted on behalf of the Minnesota Board on Aging by a student team as part of the University of Minnesota/Humphrey School of Public Affairs Summer Capstone Workshop, PA 8081. You were identified as a possible participant because you have important insights to offer about the research topic. Please read this form and ask any questions you may have before agreeing to be included in the study.

Background Information

The purpose of this study is to develop an in-depth understanding of Minnesota employer practices and attitudes toward recruiting and retaining older workers in the workforce in light of the forthcoming labor shortage within three years. An important part of the Capstone course is obtaining information from diverse stakeholders, of which you are a part.

Procedures

If you agree to be in this study, we ask that you do the following:

Answer questions about Hennepin County employer practices and attitudes toward recruiting and retaining older workers in the County workforce. Results will inform the Minnesota Board on Aging's advocacy on behalf of older workers in the state of Minnesota. The interview will take approximately one-half to one hour, and may be audio recorded (without attribution; we will guarantee anonymity in the final report and presentation).

Risks and Benefits of Being in the Study

This study has no likelihood of personal risk.

Confidentiality

The records of this study **will be kept private. *In the final report we write for the Capstone course assignment, we will not include any information that will make it possible to identify you.*** You and we will agree on a generic identifier, such as "senior official" or "current manager" to be used in connection with your comments. Research records will be kept in a locked file; only researchers (students and professors for the class) will have access to the records. If the interview is recorded, we may receive help from someone to transcribe the recording. That person will be instructed to keep the information confidential. As soon as the recording has been transcribed, the recording will be erased; that will be done within the next four weeks. All printed and electronic versions will be destroyed at the close of the semester

Voluntary Nature of the Study

Your decision to participate (or not) will have no effect on your current or future relations with the University. If you decide to participate in the project, you are free to withdraw at any time without affecting those relationships.

Interview Contacts and Questions

The researchers conducting this interview are master's-level students enrolled in the course. You may ask any questions you have prior to being interviewed. If you have questions later, you may contact Prof. Kevin Gerdes at The Humphrey School of Public Affairs; telephone 612-626-1337. If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher or the instructor, contact Research Subjects' Advocate line, D528 Mayo, 420 Delaware Street Southeast, Minneapolis, Minnesota 55455; telephone (612) 625-1650. You will be given a copy of this form to keep for your records.

Statement of Consent

I have read the above information. I have asked questions and have received answers. I consent to participate in the interview.

Signature:

_____ Date _____

Participant

Signature:

_____ Date _____

Interviewer

Appendix G: Hennepin County Leadership Interview Questions

Capstone Project Re: Employer Attitudes toward Older Workers Interview Script and Questions

Thank you for agreeing to participate in this interview. We're students from the University of Minnesota Humphrey School of Public Affairs. We're exploring employer attitudes toward older workers in the workplace. The information from this interview will be shared in aggregate with the Minnesota Board on Aging and Hennepin County as they consider future policy and other opportunities. You were previously sent an information sheet regarding this interview. Did you have a chance to review it? We are using this form to comply with University of Minnesota academic research procedures. Can you please sign this form before we begin?

Please note that your participation is anonymous. While Hennepin County recommended to us a list of potential interviewees, the county is not aware of who we have contacted. While we may highlight specific comments in our final presentation, they will not be presented in a way that would identify the source. If you're comfortable with that, let's begin...

Introduction

1. Have you recently had to hire new workers? Was it easy or difficult in your opinion?
2. Do you currently or have you in the past managed workers who are approaching or past retirement age or older?

Older workers in the workplace

3. What do you believe are the skills these older workers contribute to the workplace?
4. What do you believe are the workplace skills older workers may need to develop to continue working?
5. Our recent survey suggested that older workers at Hennepin County were viewed as less able than younger workers to learn and apply new technology. Do you agree? If yes, what if any are ways you would address this challenge?
6. Please provide an example of how Hennepin County has most successfully supported older workers while they're in the workplace. The example could either be a broad effort across county departments, or a success experienced in a specific department or team.

The Broader Issue

Before my next set of questions, I want to provide you with a bit of context... Multiple studies and sources have shown that Minnesota employers face a growing worker shortage because of demographic shifts in our population. While increasing attention is being paid to this issue, and multiple programs are in place to

expand the workforce and develop workers' skills, the number of younger workers will be insufficient to fill all of these positions within the next 3-4 years.

7. Were you aware of this challenge?

If yes, how were you made aware? In what ways — if any — has it affected your approach to retaining employees? Have you considered encouraging workers who are approaching retirement age to stay longer? In what ways — if any — has it affected the way you recruit new employees?

If no, what action — if any — are you likely to take to learn more about the issue? Do you look to your HR department to manage/deal with the coming worker shortage?

8. What do you believe might be barriers to you and other supervisors toward managing this challenge? (Prompt if needed: Training? Culture/Ageism? Policies? State or federal laws? Other?)

Managing the issue

9. As you anticipate the needs of Hennepin County and your department over the next 5-10 years, what skills do you think will be important? In your opinion, will there be an adequate supply of workers with these skills?

10. What is Hennepin County doing, or not doing, to address these future needs?

11. Do you believe that older workers can be a solution to helping fill these needs?

a. If yes, in what ways?

b. If no, why not?

12. Do you feel empowered as a supervisor/manager to take your own actions to address future needs and an expected worker shortage? If so, how?

13. In what ways, if any, does a worker shortage present Hennepin County with an opportunity to change the way it does business?

Advice, etc.

14. What advice would you offer to an employer or organization like Hennepin County or the Minnesota Board on Aging about how best to address a worker shortage? What advice would you give to policymakers?

15. Is there anything else you'd like to share?

Appendix H: Interview Coding Results

Process Description

Our team completed 10 one-on-one interviews with random members of Hennepin County leadership during the period of June 27, 2017 to July 15, 2017. A variety of business units were represented in the sample. We used an interview guide of consisting of 14 questions to conduct the interviews, each lasting between 30–60 minutes. Nine interviews were conducted in person, and one was conducted by phone. Each interview was recorded, and a transcript was made of each interview. Concepts from each transcript were entered into a single Excel spreadsheet, along with what were judged to be representational or key quotes. Codes or themes were then developed across all of the interview data. The result was a 35-page document, with approximately 120 entries. As the document was too large to include in an appendix, a summary was developed to show our process and results.

Coding of Interview Themes

We identified the following codes from County leadership responses to interview questions about employer attitudes toward older workers (including identified benefits and challenges of managing an older workforce):

Generational differences (5 responses)

- Young workers less committed than older workers; less willing to work as hard.
- Older workers approach their work differently from younger workers.
- Younger workers don't value some forms of communication skills as much as they should.

Mentoring (7 responses)

- Older workers skilled at mentoring younger workers.
- Older workers more willing to act as mentors compared to when they were younger.

Work history and experience results in skills that are valued (14 responses)

- Skills/characteristics: older workers bring stability, big picture view, project management, leadership, balance, wisdom, resilience, insight, organizational knowledge, system knowledge.
- Experience provides a base to judge whether new initiatives are worth pursuing.
- Sometimes skill can only be improved through trial/experience.

Technology and older workers (10 responses)

- Identifying the deficit, then training to overcome it, results in successful use of technology.
- Multiple or variety of job requirements/technologies present in workplace.
- Frequency of technology changes can be a challenge.
- Older worker may be embarrassed to acknowledge lack of understanding.
- Password changes/system changes can be confusing.

Caretaking challenges (2 responses)

- Aging parents sometimes disrupts work schedules.
- Similar issues surface for younger families with childcare concerns.

All interviewees were aware of the projected worker shortage, and interview questions on this topic resulted in detailed responses about Hennepin County's efforts:

Attracting new workers (6 responses)

- Change benefits to attract new workers.
- Government stability is attractive.
- Changed position descriptions/job requirements to open up potential pool of candidates.
- Changed on-the-job training of new employees to meet needs.
- Missed opportunity to recruit based on values and mission.
- Suggest apprentice program for technical areas (idea).
- Offer different/more career paths and more communication about options.

Leadership (3 responses)

- Creative leadership needed.
- Proven leadership.
- Lack of spots in current training programs for new leaders (can only train 24 per year).

Workforce shortage offers new opportunities to do business in a different way (1 response)

Interviewees were asked to describe efforts within Hennepin County to specifically attract and retain older workers, and whether those efforts were successful.

Responses reflected that efforts were on-going and successful:

- Flexible workspace
- Flexible schedules
- Ability to work remotely
- Provide dashboard of benefits (Total Rewards)
- Work-life balance
- Project-based part time employment
- Phased retirement
- Compensation based on performance
- Increased communication
- Job security within County compared private companies

Appendix I. Coding Sample—Combined Survey/Interview Comments

Question/Answer	Comments	Quote	Coding
1. What skills do older workers provide, how viewed by supervisors	KEY Blue=Participant 1 Green=Participant 2 Red=Participant 3 <i>Etc.</i>		
Experience		"We've hired quite a few people who have taken pay cuts to come in, to get the stability of the government, they are of the older generation, not millennials. We've loved them because they were perfect candidates..."	Attracting new workers: stability of gov't; Older workers skills valued
Stability			Older workers skills valued
Balance, Leadership			Older workers skills valued
Absolutely open to older workers			Solution to shortage
Calmer about things			Older workers skills valued
Draw on previous experience to help judge effectiveness of new initiative, see pattern			Older workers skills valued
mentoring, knowledge, a lot of insights, a lot of encouragement		"Supervisors do value the older worker and what they can offer. I think it's more how employees view the older worker – that's the challenge."	Mentoring: old to young, encouragement; skills thru experience: provide insight

Appendix J: Literature Review Sources and Annotated Bibliography

The literature review was informed by the following primary and secondary sources:

Peer-Reviewed Journals

- *Population and Development Review*
- *Journals of Gerontology*
- *The Gerontologist*
- *Academy of Management Journal*

Advocacy White Papers

- Gerontological Society of America
- American Association of Retired Persons (AARP)
- Federal Reserve Banks of Minneapolis and San Francisco
- The Urban Institute
- Pew Research

U.S. and State Government Reports

- Minnesota State Demographic Center
- Minnesota Department of Employment and Economic Development (DEED)
- U.S. General Accounting Office (GAO)
- U.S. Bureau of Labor Statistics (BLS)
- Minnesota Governor's Workforce Development Council (GWDC)

University Reports

- University of Minnesota Center for Urban and Regional Affairs
- University of Minnesota Office of University Economic Development
- University of St. Thomas
- Boston College Center for Retirement Research and Sloan Center on Aging and Work
- Cornell University School of Industrial and Labor Relations

U.S. Media and Consulting Organizations

- Gallup Organization
- *Next Avenue* digital platform (PBS/TPT Minnesota collaboration)
- *StarTribune*
- *Time*
- *Data360.org*

Annotated Bibliography

This annotated bibliography provides references and summaries of selected resources related to the research topic, some cited within the body of the paper, and others that offer additional background.

Allen, R. (2017). *Immigrants and Minnesota's Workforce*. The Committee on Minnesota Workforce and Immigrants, University of Minnesota Office of the Vice President for Research. Available at <https://goo.gl/P8TC96>

Summary. While not directly related to employer attitudes toward Boomer employees, this report sheds light on demographic considerations for employers related to their foreign-born, older workers. The report looks at six main issues associated with workforce changes in Minnesota due to demographic shifts in the state's population: slower population growth and greater diversity by age, race, and ethnicity; diverging situations in urban and rural parts of Minnesota; the state's increasing dependence on immigrants to grow the population base; the disparity between highly educated and under-educated immigrants in the workforce; and the state's overall dependence on immigration/immigration to fuel growth.

Relevance. Provides context for the crucial role of immigrants in the present and future Minnesota workforce. While not overtly focused on older workers, other sources have pointed to the key role of older workers in the Minnesota workforce, and the fact that many are under-educated service sector workers from immigrant communities.

Eisenberg, R. (2017, May 9). "Why isn't business preparing more for the future of aging?" PBS/Next Avenue. Available at <https://goo.gl/NtDbhb>

Summary. This essay mentions research from the MIT AgeLab and discusses unconscious biases in the workplace—that older workers are less productive than younger workers, less able to learn new processes, and cost employers too much. Thoughtful discussion.

Eschtruth, A., Sass, S., Aubry, J-P. (2007). *Employers Lukewarm About Retaining Older Workers*. Center for Retirement Research at Boston College.

Summary. This research discusses "two surveys of 400 nationally representative employers." Findings include that "employers are only *slightly* more likely to accommodate even half of their employees who will want to stay on." Companies are more likely to accommodate "older workers if they expect employment growth, value older workers' institutional knowledge, and/or have older workforces. Employers that view older workers as costly and/or as operating in an environment where the pace of technical change is slow were less likely to" say that they would accommodate older workers. "Employers that expect strong growth in the coming decade are more likely to create opportunities for employees to stay on past the traditional retirement age. [Contributions to] the knowledge base also raise the likelihood that an employer will retain older workers."

Relevance. This research provides a nice baseline of information against which we might measure our own original research. It also provides guidance on potential question framing for our research. However, it has limitations in that it "included only organizations where at least 10 percent of the entire workforce was over age 50. All" survey respondents faced the "prospect of losing at least 10 percent of their total workforce when" the Boomer generation retires. In addition, this survey was conducted pre-recession—a potentially different work environment than employers face today.

Eyster, L., Johnson, R., Toder, E. (2008, March 7). “Current Strategies to Employ and Retain Older Workers.” The Urban Institute. Available at <https://goo.gl/Rn4weK>

Summary. This advocacy piece discusses the aging U.S. population and points out the need for employers to redouble their efforts to hire and “retain older workers as the number of people reaching traditional retirement ages increases.” Mentions the value of knowledge transfer and the value of flexible work arrangements.

Farrell, C. (2016, July 8). “Employers are rethinking older worker stereotypes.” PBS/Next Avenue. Available at <https://goo.gl/x4txep>

Summary. This essay discusses the worker shortage and its effect on employers: they will be pushed to be increasingly creative in using of older workers to staunch the workforce gap. Cites the situation that more than half of employees at the Brooks Bros. factory are over 55, and mentions older workers make fewer mistakes, mentor younger workers, and look for flexible scheduling. Suggested resource: Columbia Aging Center at Columbia University, NYC, Age Boom Academy. Mentions Social Venture Partners, Seattle: “We’re trying to get society to understand that people over 50 are an asset, not a liability,” says Jim McGinley. *The New Talent Landscape: Recruiting Difficulty and Skills Shortages*, a June 2016 report from the Society for Human Resource Management, asserts that “replacing retiring Baby Boomers will continue to be a key staffing challenge in the years ahead. Organizations that can continue to engage their mature workforce and even retain them beyond retirement age will have an advantage.”

Relevance. The potential benefits to employers from efforts to retain older workers is being recognized, but the academic and applied work in this area is relatively new.

Federal Reserve Bank of Minneapolis. (2004). *Welcome to Retirement. Now Back to Work*. Available at <https://goo.gl/AG8dwp>

Summary and Relevance. Discusses effects on the labor market of impending retirements and hits to labor supply. “Other things equal, lower growth in labor supply means less economic growth and lower standards of living. Because of our advanced demographics, this phenomenon may hit the Ninth District [Minnesota and surrounding environs] sooner than it will other parts of the nation. But other factors suggest that work and retirement could well be different for baby boomers than it was for their parents. And the aging of the population may influence economic growth in ways that could mitigate the impact of lower labor supply growth.”

Feinsod, R., Illiano, E., et al. (2015). *A Business Case Report for Workers Age 50+: A Look at the Value of Experience 2015*, AARP, Washington DC, pp. 1-101.

Summary. The old view is “that older workers are more expensive” relative to younger workers, because more experience equals higher wages plus higher benefit costs. The new view/conclusion of report is that compensation and benefits are no longer “significant factors” in the costs of hiring and retaining older workers (p. viii). In a Society for Human Resource Management survey, 40% of HR professionals said loss of talent through retirement or departures of 55+ workers is a problem or crisis. Employee engagement is key to results, and 55+ workers are the most engaged and have highest motivation (p. 16). Per Aon Hewitt, for every 5% increase in employee engagement results in 3% increase in revenue (p. 19). Move toward performance-based vs. tenure-based compensation has decreased the rate of increases of employee costs due to older workers (p. 2) All healthcare costs are increasing, but the rate of increase for 50+ slower than others in large part due to reduced prevalence of big expense diseases such as cardiac disease (p. 36). Shifting away from defined benefits (DB) to defined costs (DC) reduces retirement spending by employers and thus makes costs more age neutral e.g. 26% retirement benefit cost now 20%. Value considerations for older workers: most highly engaged, more predictable turnover patterns, complex jobs increase importance of experience & knowledge, importance of mentoring/transferring knowledge. Top 5 drivers of engagement are same for older and younger workers (p. 60). Strategies cited by HR professionals to retain/recruit 50+: reduced hours/part-time, hire as consultants/temp/project based, flexible scheduling, bridge employment, phased/gradual retirement.

Relevance. As one of the primary trade associations focused on older American issues, AARP has begun to study employer attitudes toward, and opportunities given, older workers. There is evidence that managers have not fully recognized that their long-held beliefs in the relatively higher expense of older workers no longer applies, that trends toward productivity-based compensation and the overall improved health of older Americans has meant the relative expense of older workers as a group is no longer significantly different than younger employees.

Lindsley, B. (2013, January). *Most Competitive Workforce in the World*, Governor's Workforce Development Council (GWDC), St. Paul, MN. pp. 1-20.

Summary. The focus of the GWDC is on career pathways, so it's mostly aimed at younger workers. The federal Workforce Investment Act "focuses on short-term job search" and training. "85% of all new jobs created in the last 10 years will require post-secondary [education]." Training has the biggest impact on employment and earnings.

Relevance. Although there are state and federal programs aimed at increasing the availability of trained and work-ready employees for Minnesota employers, most are focused on younger workers or those diverse populations underrepresented in the workforce.

Mermin, G., Johnson, R., Murphy, D. (2007). "Why do boomers plan to work longer?" *Journal of Gerontology*, vol. 62B, no. 5.

Summary. Provides an "analysis of data from ["The Health and Retirement Study,"] a longitudinal study from the University of Michigan's Institute for Social Research." "Boomers (born between 1946 and 1964) will remain at work longer than the previous generation. The recent uptick (between 1992 and 2004) appears to be the leading edge of a new long-term trend." Several reasons: "Erosion of employer retiree health benefits" (explaining "as much as half of the increase in longer work expectations" for older employees); a trend away from defined benefit pensions (explaining "as much as 23% of the increase in work expectations"), which encourages longer work tenure to fund retirement; and demographic trends (i.e., higher education attainment in this age group, declining marriage rates, and "movement of [more] women into the labor force"). As a result, "some analysts have suggested that slow labor force growth could result in worker shortages or skill gaps that impede economic progress."

Relevance. This research is useful because it asked respondents working for pay: "Thinking about work generally and not just your present job, what do you think are the chances that you will be working full-time after you reach age 62/65?" It then "modeled retirement expectations for both generations" (Boomers and the previous generation). The research is limited, however, to identifying potential correlations between longer work periods and work conditions such as insurance availability, and falls short in identifying the nuanced or multiple factors that may work together to influence an employee's decision to continue working. For our purposes, this national perspective may not easily translate to Minnesotans.

Minnesota Department of Economic and Employment Development. (2015, May 19). *DEED Deputy Commissioner Jeremy Hanson Willis Discusses DEED's Role in Developing, Retaining Older Workforce at U of MN Think Tank*. Available at <https://goo.gl/IDE3dB>

Summary. "More U.S. workers ages 55 and over are employed than ever before. And we know we're riding the baby boomer retirement wave, ready or not. There were almost 33 million workers aged 55 years and over in the U.S. in 2013, accounting for just over one-fifth of the total labor force, according to data from the U.S. Census Bureau's American Community Survey. Here's the Minnesota picture: 636,500 workers aged 55 years and over accounted for 21.2 percent of the total labor force." "Employers that seek out older workers: AARP lists employers recognized for exceptional practices regarding older workers and national employers that abide by age-neutral policies." Securian Financial Group in St. Paul recognized as an AARP best employer for several years. "Its foundation also sponsors a

work search information network to help older workers manage their job search. The Wells Fargo 'Boomer Connection' is a model for a development and support group for boomers within the workplace. The group has sponsored forums and provided information to boomers at Wells Fargo about opportunities, benefits, and retirement planning. Social media: Employers often search for candidates using social media"; urges establishing or updating social networking accounts on Facebook and LinkedIn, identifying key employers, using social media to network.

Relevance. Detailed demographic information and descriptions of job search mechanics for and by older workers offer valuable insights into older worker position in the workforce.

Moen, P., Kojola, E., & Schaefers, K. (2017). "Boomers at work and in transition," University of Minnesota Center for Urban and Regional Affairs, *CURA Reporter*, 47:1, pp. 3-9.

Summary. This article presents results of in-depth interviews with 23 employers of Boomers and 27 Boomers in the workforce. According to the research, there is "a fundamental mismatch between what many Boomers want or need in this new 'encore' adult stage [before full retirement outside the workplace] and the outdated policies and practices shaping the conventional life course" (Moen). Among workers, "most do not envision the sharp divide between paid work and retirement experienced by previous generations. Instead, many want to scale back or seek second acts, rather than opt out of the workforce altogether.... They express a desire to remain active and engaged either through paid work, often in encore jobs, or unpaid activities." Boomers want "more control over their time, schedules, and the type of work they do," according to the study. "People with inflexible employers and highly demanding jobs report wanting to retire or leave their jobs for more flexible work. The stress of highly demanding and inflexible work pushes Minnesota Boomers toward retirement."

Among employers, "most surprising is that the innovative policies reported for older workers are in fact designed for opening up options for workers of *all* ages, not just older workers." The study notes that managers are often reluctant to raise the topic of retirement for fear of age discrimination, etc. This can limit the ability of both workgroups and older employees to proactively plan for the future. At 19 of the surveyed organizations (80%), retirees are eligible to be rehired and are often brought back on a contract or project basis. 80% engage workers of all ages, including older workers, in training and professional development. Professional development and education reimbursement programs allow older workers to continue building their skills and even move up within the organization. The study findings suggest most employers "get it"—that they must understand the preferences and circumstances of their Boomer workers and retirees; the potential implications of an aging workforce for their work processes and work environments; the shifting technological and social aspects of contemporary work together with outdated age-graded policies and practices that limit Boomers' options for working more flexibility, moving into and out of employment, or taking on encore careers (Freedman, M.) that promote the greater good. The types of responses tended to vary by size of the organization. Some policies are not formalized, which can be problematic, the research found.

Relevance. Overall, this study offers probably some of the best comparison data for our work — especially because it occurred in Minnesota. It also provides additional data that compares well with some of the national data found on various methods of encouraging the retention of older workers.

Moen, P. (2016). *Encore adulthood: Boomers on the edge of risk, renewal, and purpose*. New York, NY: University Press Scholarship Online/Oxford University Press.

Summary. Moen explains that gender and age influence when/how men and women exit the workforce and/or what they choose to do outside of their careers. "Because age is a key way of categorizing people, it contributes to age stereotypes (assumptions about abilities and behavior) and age discrimination (ageism), which, like gender and race discrimination, cut people off...." Discusses influences on worker norms/institutional norms and essential workplace mismatches between worker needs and what they find.

Steps to solve this problem: (Ch. 8)

1. Fixing the work-time mismatch—schedule flexibility and control, leading by example (e.g. federal, state and local governments)
2. Addressing the life-course mismatch—the need to change language, the need to change customs, rules and laws, rewriting life-course scripts, postponing retirement solutions,
3. Recognizing the risk-safety net mismatch—job and economic insecurity risks (large-scale policy shifts are necessary to shore up insurance against employment and economic insecurity), health risks

“Government policy innovations are fundamental to redesigning a twenty-first-century life course, since state rules and regulations constitute the constraining and enabling environments in which businesses, community service organizations, families, and individuals operate (Ch. 7).” For example, policies and practices encouraging early and “total” retirement, Social Security payouts, and policies in other countries. Some examples from higher education include lifelong learning, IT and Encore Education.

Relevance. There appears to be limited information in the literature about the impacts on women, people of color, and other minorities. This source comes closest to examining the traditional life/career cycle being structured by/for white men who are in white-collar or blue-collar unionized jobs in the early half of the 20th century. As Moen indicates, this history provides important context around the retirement expectations of Boomers and their employers. More importantly, Moen suggests that Boomers have very different histories than other generations that follow them. As a result, the client’s desire to avoid making our research about Boomers -- but instead about older workers (i.e. so that it has application to future generations) -- may be impossible. In fact, there may even be differences within the Boomer generation when comparing the historical influences and life experiences of young vs. old Boomers.

Moen, P., Kojola, E., & Schaefer, K. (2015). *Organizational Change Around an Older Workforce*. University of Minnesota and University of St. Thomas.

Summary. This study focuses on the Minneapolis-St. Paul metro region and involved interviews with 23 organizations (11 private-sector, 4 government agencies, and 8 nonprofits). The study finds that “organizations are leading change by developing universal policies and practices, not ones intentionally geared to older workers. Both their narratives and strategies — opportunities for greater employee flexibility, training, and scaling back time commitments — suggest deliberate disruption of age-graded logics, replacing them with new logics valuing older workers and age-neutral approaches.” The study also finds that “organizations in the different sectors studied are fashioning uniform policies regardless of age.” In other words, the organizations appear reluctant to create policies that cater only to older workers.

Relevance. This study contains good background information about the mismatch between workforce policies and practices, and “the changing demographics and desires of the workforce.” Even more importantly, it is one of the few studies found that focuses on Minnesota employers. The study acknowledges that “Minnesota is among the top 20 states in the proportion of its population who are Boomers (26%), and its proportion of older residents is expected to grow over the next 15 years—a challenge employers and policymakers are beginning to address.” Unfortunately, among the study’s limits are its small sample size — particularly related to government, which is of particular importance for our research.

Mulders, J.O., Henkens, K., Schippers, J. (2015). “Organizations’ ways of employing early retirees: The role of age-based HR policies.” *The Gerontologist*, Vol. 55, No. 3, 374-383.
doi:10.1093/geront/gnt114

Summary. This study is based on a 2009 survey of 4,700 Dutch employers. “One in seven organizations that employ early retirees do not pay them or only reimburse their expenses.” Organization “size is most strongly related to the employment of early retirees. Small organizations (with up to 25 employees), on the other hand, are less likely to employ early retirees.” Retirement is considered as a transitional phase from full-time work to full-time non-work.

“Bridge employment” describes the phase between full-time work and retirement. Four work plans were examined: flexible hours, “demotion” or scaling down responsibilities, “namely demotion, offering training opportunities to older workers, offering early retirement, and allowing flexible working hours.”

Relevance. This study offers helpful potential guidance on framing our survey and offering an international comparison point against which to compare the use of early retirement workers and the potential “effects of age-based HR policies.” However, it has a significant number of limitations. First, it utilizes “crude measures for organizations’ employment of early retirees,” and provides only four classes of HR rules: (1) demotion, (2) “offering training opportunities to older workers,” (3) “early retirement” offers, and (4) “allowing flexible [work] hours.” Second, “the study took place in the Netherlands,” where there are very specific work rules and public policies that may vary greatly from those in the United States. Third, it focuses on a small sliver of the age groups in our study. Finally, the study itself cautions that care be taken in additional research “to disentangle causal effects of HR policies and employment practices.”

Munnell, A., Sass, S., & Soto, M. (2006) *Employer Attitudes Towards Older Workers: Survey Results.*
Center for Retirement Research at Boston College.

Summary. This study includes results from a “survey of 400 private sector employers.” *Productivity:* “Employers view older workers as more productive. Age was a significant advantage in white-collar jobs. A clear majority said older managers and professionals were ‘more productive,’ whereas about 40% of employers said the same about older rank-and-file workers.” Perceptions about productivity varied with familiarity, either based on percent of workers in this age group or respondents who were part of this age group. Views were also less enthusiastic among small and very large firms, and employers with defined benefit pension plans. *Advantageous Characteristics:* Two characteristics of older workers most frequently cited as advantageous were “knowledge of procedures and other aspects of the job” and “the ability to interact with customers.” Mid-range were “ability to learn new tasks quickly” and “physical health and stamina.” Least advantageous was “expectations for how much longer workers will be working.” *Cost:* More than 40% “said older workers are more expensive than someone younger, twice as many as said they cost less.” *Attractiveness:* “Two-thirds of employers said an older employee or prospect is neither more nor less attractive than someone younger. This is true for both white-collar and rank-and-file workers. [Nevertheless], the survey suggests that white-collar workers have better prospects than rank-and-file workers for extending their careers. The overwhelming majority of employers said older workers were ‘as attractive’ or ‘more attractive’ than a younger employee or prospect.”

Relevance: This research further informs the development of our survey by highlighting characteristics of older workers and descriptions about how employers view older workers. However, it has the following limitations for our work: These data are specific to private sector employers, which may differ significantly from the large public-sector employer we are surveying (i.e., Hennepin County). Like many of the other employer surveys in the literature, it also preceded the Recession, which could affect employer attitudes.

Schramm, J. & Wessels, K. (2014, December). *Preparing for an Aging Workforce: Executive Summary,*
Society for Human Resource Management. Available at <https://goo.gl/MF6JuF>

Summary. 3-year study on value of older workers as identified by HR professionals, with Alfred Sloan Institute, 20,000 surveys sent to HR professionals, 10% response rate. 2014 percentage of older workers by industry: Healthcare 30%, Gov’t 29.3%. 50% of companies track retirements out 1-2 years, few go further. Barriers identified to retaining older workers: flexible work location, career flexibility, work hour flexibility, scheduling flexibility. 61% say try to capitalize on older worker experience, 54% have cross training or other programs to capitalize on knowledge/transfer knowledge from older workers, 1/3 had mentoring programs
Top 5 advantages: more work experience, mentors, more reliable, more professional. Strongest applied skills: professionalism, critical thinking, self-direction, leadership, ethics/social responsibility

Relevance. Human resource professionals have recognized there is a looming bulge of workers who will be aging out of the workforce, but few recognize the urgency of addressing the issue, nor have considered alternative approaches to retain those workers past the traditional retirement age.

Swift, A. “Most U.S. employed adults plan to work past retirement age.” Gallup. Retrieved May 16, 2017.
<https://goo.gl/APPmr1>

Summary. Gallup conducted a telephone survey “April 5-9, 2017 with a random sample of 1,019 adults, ages 18+, living in all 50 U.S. states and the District of Columbia.” Results showed that “two in three employed U.S. adults (63%) say they plan to work past retirement age, but on a part-time basis.” This rate is constant compared to 2011 and 2013. “An additional 11% say they will work full time once they hit retirement age. A quarter of employed Americans say they will stop working altogether.”

Relevance. While this poll does not serve to inform the development of our research — because the respondents to Gallup were current or eventual retirees as opposed to employers — this research does provide very current national data on employee intent. In that regard, it may provide content for the introduction/context setting of our paper and presentation and/or may inform our recommendations.

Tishman, F., Van Looy, S., Bruyere, S. (2012). *Employer Strategies for Responding to An Aging Workforce*. Cornell University School of Industrial and Labor Relations, Employment and Disability Institute.

Summary. This study was multi-faceted and included a literature review, interviews with “national experts and thought leaders in the field of employer strategies for addressing an aging workforce, [and interviews with] public- and private-sector employers recommended by the national experts.” The study looked at “promising employer strategies to recruit, retain, train, and promote and enable bridges to retirement for older workers with disabilities.” It offers examples of retention efforts that have succeeded and recommends investigating public policy changes for “increasing the minimum retirement age, providing incentives to older workers to remain employed longer, and offering employers payroll incentives to hire and retain older workers.” The study examines age-related issues in the workplace and successful employer accommodations. The researchers found “that job retention could be achieved by providing interventions that prevent early retirement.” Study results also highlight both “positive and negative perceptions of older workers,” as well as a focus on flexible arrangements, including “job sharing, shifting to a different job, schedule flexibility, flexibility of place, snowbird programs, deferred or phased retirement,” and so on.

Relevance. This study provides a variety of potential options to consider in our survey and interview questions, as well as recommendations (including examples of companies/organizations that have taken the various recruitment, engagement and retention steps mentioned).

University of Minnesota. (2015, May 15). *Convergence Colloquia: Cultivating Serendipity for Action—Aging*.
http://www.research.umn.edu/convergence/documents/Report_Aging.pdf

Summary. The “Minnesota Governor’s Workforce Development Council is made up of leaders from business, education, labor, community organizations, state agencies and local governments. The Council’s 2012 policy advisory report [“All Hands on Deck,”] outlines four recommendations focused on aging workers. (1) The report emphasizes the importance of capacity building in Minnesota’s workforce development system to address demographic and economic changes, including through the state’s WorkForce Centers. (2) The report calls for developing a state plan to extend the work life of aging workers by addressing issues such as training for older workers, post-retirement work, paid volunteer opportunities and pension and retirement policies. (3) [Recommends establishing] Lifelong Learning Accounts to help aging workers finance continuous learning opportunities. (4) The report calls for support for entrepreneurship and small business development among aging workers by better coordinating federal, state and local business development resources.”

Relevance. Minnesota as a state has begun to consider the impact of its aging workforce, although the impact on policy seems limited.

The Urban Institute. (2007). “Fact sheet on population aging: Are employers willing to hire and retain older workers?” Available at <https://goo.gl/7WsBQF>

Summary. “Employer attitudes toward older workers are mixed.” “Employers value older workers’ loyalty, work ethic, reliability, and experience.” Reviews older but still relevant research: “Munnell, Sass, and Soto (2006): They view older white-collar workers as more productive than younger white-collar workers. Yet, employers express concern that older workers may be less creative, less willing to take initiative, less willing to learn new things, and less able to perform physically demanding jobs.” “Employers are also concerned that older workers are more expensive. Older workers are paid more. In some cases, age–wage rate relationships reflect historical seniority arrangements instead of relationship of age and experience to productivity. Health insurance costs to employers increase with age. Traditional defined benefit pension plans have very high accrual rates just before retirement age. Most employers report that older workers’ high productivity offsets their higher costs.” “Employers are less likely to train older workers because there is less time for employers to recoup costs.” “Some employers continue to discriminate based on age. Some older adults report in surveys that employers treat older workers less fairly than younger workers and that older workers are more likely to be laid off (Reynolds, Ridley, and Van Horn 2005). In one study, employers were less likely to call back older job applicants for interviews than otherwise identical younger ones (Lahey 2005). Employers may be more hesitant to hire than retain older workers. There is less time to recoup recruiting, hiring, and training costs from older new hires. Older new hires rapidly accumulate defined benefit (DB) pension benefits.” “Older new hires may be more difficult to terminate because of the Age Discrimination in Employment Act.”

Relevance. Summarizes pros and cons described by employers of older worker characteristics. Also provides insight into employer biases, attitudes, and cost concerns.

U.S. Bureau of Labor Statistics. (2016, September). “Employee Tenure in 2016.” Available at <https://www.bls.gov/news.release/pdf/tenure.pdf>

Summary. Provides demographic trends of the older worker group with data from the Current Population Survey—median tenure, age, race, education, fields of employment. Other documents available: “Institutional Barriers to Employment of Older Workers” (1989)—many interesting topics, although all 15 or more years old.

U.S. General Accounting Office. (2005, April). “Redefining retirement: Options for older Americans” Available at <http://www.gao.gov/products/GAO-05-620T>

Summary. An early look at demographic trends related to the aging of the population and its financial consequences for economic activity and productivity. Also discusses the effects on national policy and entitlement planning.

U.S. General Accounting Office. (2003, Feb. 13). “Policies of Other Nations to Increase Labor Force Participation” Available at <http://www.gao.gov/products/GAO-03-307>

Summary. Looked at the responses of Japan, Sweden, and the UK to demographic shifts caused by the aging population, a problem faced internationally somewhat earlier than in the US. “The experiences of these nations suggest that the nature of the reforms, the public availability and transparency of information on the reforms, and the strength of the national economy play key roles in extending older worker labor force participation.”

Relevance. Reforming national and employer pension plans “provide incentives to work longer, but must also be paired with labor market reforms and economic growth to provide job opportunities to older workers if they are to be effective.”